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ABSTRACT

This report discusses findings from case studies in California, Missouri, New Mexico, and Pennsylvania that examined ways in which state-level general and special education reforms interact, impact local districts, and affect the educational programs for students with disabilities. Chapter 1 reviews two major state-level priorities for education in the four states: raising education standards and containing education costs. It then explores the effects of state cost-containment measures on local school districts. Chapter 2 focuses on how school districts are responding to state-generated standards-based reforms, and discusses why the kinds of policy actions that the states are taking to reform education are not necessarily the kinds of actions that are most likely to influence local educational practices. It reviews the immediate pressures that the districts must address as they improve their educational programs, and how this leads the districts in directions that may not match up with state education priorities. Chapter 3 looks at the innovations and the variability that arise as the districts invent their own approaches to serving students with disabilities in the absence of clear state guidance. The report concludes with issues that states should consider to increase the impact of standards-based reform. (Contains 59 references.) (Author/CR)

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THE PUSH AND PULL OF STANDARDS-BASED REFORM

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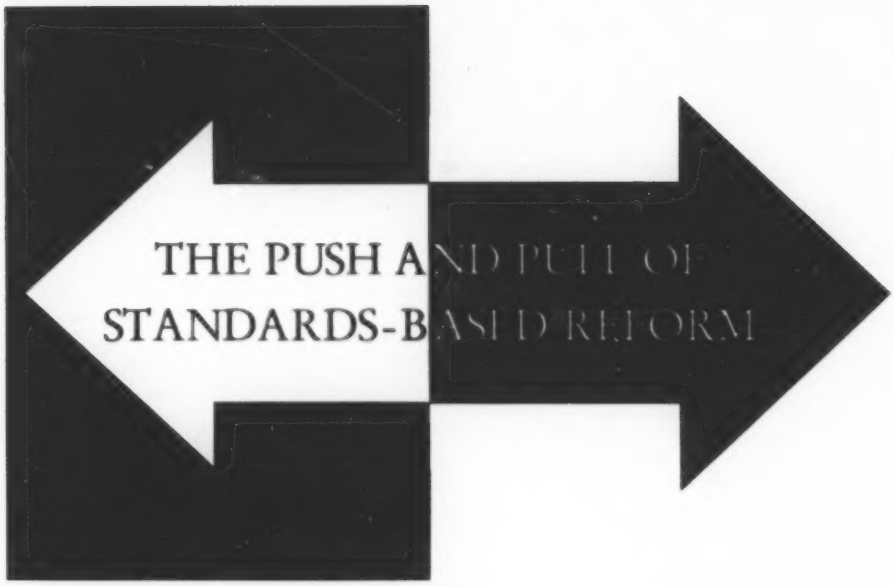

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Suzanne Raber and Virginia Roach
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The Center for Policy Research on the Impact of General and Special Education Reform

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- **What Will It Take? Standards-Based Education Reform for ALL Students.** This report raises important questions about whether recent efforts to improve the education system will, in fact, raise educational achievement for all the diverse populations of children in schools. A clear explanation of the nature of education reform, how it is being carried out in the states, and the involvement of the special education community in this work, are included. (October 1996, 30+ pp., $10.00)

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Preface: The Center for Policy Research on the Impact of General and Special Education Reform

The information in this report has been drawn from case studies conducted by the National Association of State Boards of Education (NASBE) on the impact of standards-based education reform on local school districts and students with disabilities. The case studies are part of a longer-term, multi-year research effort conducted by the Center for Policy Research on the Impact of General and Special Education Reform. This Center was established in 1994 by the U.S. Department of Education's Office of Special Education Programs, and it is a joint endeavor of NASBE, the Institute for the Study of Exceptional Children and Youth at the University of Maryland (UM), and the Consortium for Policy Research in Education (CPRE) at the University of Pennsylvania. The Center's mission is to investigate and analyze critical issues in current general and special education policies, their interactions, and their impact on students with disabilities. A central focus of this study is to discern policy options for stakeholders at the federal, state, and local levels.

The American education system is currently undergoing reform at all levels. Changes are steadily being made in funding, governance structures, curriculum standards, staff development, assessment, and student support services. As part of these reform efforts, policymakers are looking anew at special education and its role in the overall education system. Education policymakers are searching for and demanding guidance on these issues in terms they can understand. The research base necessary for enlightened decision making is sparse, and examples of successful policies are not widely known. Policy analysts from both general and special education need to work together to learn more about the impact of reform on all students.

To address this need, the Center is conducting interrelated research studies over a five-year period. To date, NASBE has conducted in-depth case studies in four states (California, Missouri, New Mexico, and Pennsylvania) and two local districts in each state to examine the ways in which state-level general and special education reforms interact, impact local districts, and affect the educational programs for students with disabilities. UM has conducted in-depth case studies in Maryland, Nebraska, Colorado, Washington, and Kentucky of local school districts that are engaging in general and special education reforms, including their interactions with state-level policies. CPRE has conducted a descriptive analysis of state-level educational reforms and resultant programs in California, Colorado, Connecticut, Florida, Georgia, Kentucky, Maryland, Michigan, Minnesota, Missouri, Nebraska, New Jersey, New Mexico, Pennsylvania, South Carolina, Texas, Vermont, and Washington.

This report is based on the 1997 Center study entitled "State Education Reforms: District Response and the Implications for Special Education" by Virginia Roach and Suzanne Raber. That study reports data drawn from NASBE's in-depth case studies in California, Missouri, New Mexico, and Pennsylvania.

Acknowledgments

The Center would like to acknowledge its gratitude for the cooperation of the departments of education, local school districts, principals, teachers, and parents who assisted with this research project in four states and eight school districts. We are particularly grateful for the support of the state and local directors of special education. We would also like to thank the Office of Special Education Programs (OSEP) for its support of this project. However, the views expressed in this report do not necessarily express the views of the U.S. Department of Education.

Introduction

This is a report about state-level attempts to improve the public education system, local educational practices and priorities, and the inclusion of students with disabilities in local programs. Taking a case study approach, we have looked closely at education reform in four states—and two local districts in each state—to understand how state intentions interact with local realities. How is the state-driven "standards-based reform movement" affecting local schools? Which issues are actually driving local school districts to change their educational practices? And what are the implications for students with disabilities?

"Standards-based education reform" is a national movement led by state governments to substantially improve the knowledge and skills that *all* students attain as a result of their schooling. This movement seeks to "raise the standards" for student achievement by providing challenging goals for student learning, by supporting students in their attainment of higher standards, by conducting assessments to find out if students are improving, and by spelling out consequences for schools whose students fail to improve. Begun in the early 1980s, these reforms were fueled by the perception (as documented in the 1983 report, *A Nation at Risk*) that the nation's public schools are providing many students with an inadequate education and thereby putting them at a significant disadvantage.

In 1996, the Center for Policy Research on the Impact of General and Special Education Reform issued *What Will It Take? Standards-based Reform for ALL Students*, a report that examined state-level, standards-based education reforms in 18 states. The purpose of this study was to describe the standards-based education reform movement for a general audience, to consider the policy tools that states can use to change the education system, and to explore the involvement of the disability community in current state-level education reform. Through that study, we wanted to learn whether decision makers were working with special educators at the state level to ensure that new policies are relevant and useful for all students, including students with disabilities.

As *What Will It Take?* describes, the involvement of special educators in standards-based reform has been limited to date. We discovered that much work remains to be done in finding out how the higher standards that states are setting for student performance will apply to the diversity of students in public schools—whether those students have disabilities, speak English poorly, or are already failing at school because of problems in their homes or communities. What will it take to support significant increases in these students' performance at school? This is an important issue, particularly since a central tenet of the standards-based reform movement is to set high standards for *all* students' achievement.

This year's report goes beyond the state level to examine education practices in eight local districts in the four states of California, Missouri, New Mexico, and Pennsylvania. As we visited local school districts, we were looking for the answers to the following two questions:

- How are the districts responding to state-generated, standards-based reform?
- How are students with disabilities included in education reform initiatives at the local level?

The school districts that we studied were not selected on the basis of their commitment or capacity to undertake state-generated reforms. Rather, we selected our study districts to represent a range in degree of urbanicity and diversity across the states:

- In California, we studied two large, diverse urban districts.
- In Missouri, we examined two rural, racially homogeneous districts.
- In New Mexico, we looked at two rural/suburban districts with a high degree of student cultural diversity.
- In Pennsylvania, we studied two fairly homogeneous suburban districts.

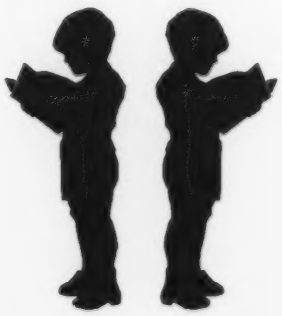
Within each state, we matched our two study districts according to size, the percentage of students on free and reduced lunch, and the percentage of non-white students in the district. It was interesting that although we chose to study a relatively small number of school districts in different parts of the country, we found that many similar issues arose as we interviewed local and state administrators, educators, and parents. This leads us to believe that the lessons we learned may be useful for other states and districts to consider.

Our major findings are organized in the following way: Chapter One reviews two major state-level priorities for education in our four study states: raising education standards and containing education costs. We will then explore the effects of state cost containment measures on the local districts that we studied.

Chapter Two focuses on answers to our first research question and examines two sets of reasons why the influence of state-level standards-based reform is limited in the local school districts that we studied. First, we will discuss reasons why the *kinds* of policy actions that our study states are taking to reform education are not necessarily the kinds of actions that are most likely to influence local educational practice. Then, we will review the immediate pressures that our study districts must address as they improve their educational programs—and how this leads these districts in directions that may or may not match up with state education priorities.

Chapter Three examines our findings in regard to our second research question and looks at the innovations and the variability that arise as the districts we studied invent their own approaches to serving students with disabilities in the absence of clear state guidance.

Finally, this report concludes with some observations and issues that future policymakers may wish to consider as they continue to work on improving the educational achievement of all students.



Chapter I. State-Level Education Priorities and the Effects of Cost Containment on the Local Districts that We Studied

This chapter will provide an overview of two major state-level priorities in the states that we studied: standards-based reform and containing education costs. We will examine ways in which these two goals can contradict one another, as well as the particular influence of cost containment on the districts in our study.

The Standards-based Reform Movement

As described in the Center's 1996 report, *What Will It Take?*, the major theme in the movement to improve education nationally is "standards-based reform." There are two parts to this idea. First, the education enterprise should be guided by *new kinds of standards* that describe what students should know and be able to do as a result of their schooling. Second, these standards should be *rigorous and reflect higher expectations* for student performance. Most states have set new standards for student and school performance over the past ten years.

How did the standards-based reform movement come about and why do people believe that it will improve the public education system? It is important to dwell briefly on this question because the term "education reform" means different things to different people, partially reflecting various theories about improving the education system that were current at different times.

States have spent a good deal of time and effort trying to improve the public education system over the past 15 years. Many people trace the beginnings of this movement to the publication of *A Nation at Risk* in 1983, which documented and heated a simmering concern that student achievement levels in the United States were not only mediocre but were inadequate for an increasingly demanding job market. This mediocrity was seen as a threat to America's position in the competitive world economy. Several "waves" of education reform followed as states became increasingly active in trying to improve schooling at the local level. A first wave of reform was characterized by "top-down" strategies as states sought to regulate educational "inputs" (such as lengthening school days, increasing high school graduation requirements, and changing teacher education and certification requirements) and to assure student competency (via graduation tests and promotional criteria, for example) (Fuhrman, Clune, and Elmore, 1988). But the results of these "top-down" strategies were disappointing (Smith and O'Day, 1990).

In the late 1980s, the fact that top-down strategies were perceived as ineffective merged with a number of issues to change states' strategies. Now, there was a greater appreciation for the importance of "bottom-up" reform, meaning that education could not improve unless schools themselves undertook fundamental improvements in the way teaching and learning occurred. Schools needed *flexibility* and *support* from states—not just top-down mandates—in order to substantially improve the way teachers taught and students learned. Thus, states began to support "site-based management" and other experimental programs to support schools in crafting their own improvements.

Layered on top of this new support for "bottom-up" reforms were several new concepts that have been adapted by educators and, in their new form, continue to drive state education policy today. As described by Smith and O'Day in 1990, these ideas argued for an approach to improving education that was:

- ***Based on a Unifying Vision and Goals***. States should establish a common vision of what schools should be like and what students should know and be able to do. Although creating goals for student achievement was seen as powerful, state visions could also include statements about the nature of educational "inputs" such as the quality of the teaching force or of the curriculum in schools.

Systemic. Making fundamental changes in education should be consistently reflected in state vision statements and clear, coherent state policies aligned to that vision—including states' curriculum materials and guidance; preparation and licensing of new teachers; evaluations of students, schools, or teachers; and fair and adequate financing. All of the older education policies need to be carefully reviewed and changed, if necessary, so that they support the new approach. This kind of careful review and revising of old policies had not always been done in the past, meaning that old and new state education policies sometimes contradicted each other, which caused confusion and even resentment at the local level. Such contradictions have also been shown by research to be a barrier to change at the local level (Firestone, 1989).

Supported by changes in the governance of education. Clear and appropriate roles should be established for states, school districts, and schools in supporting student achievement. In general, the role of states and districts is to serve the schools by providing clear direction, support, and oversight while assuring equity. States are to set clear, definable goals for students and schools at the top of the system and then give local districts and schools more flexibility to determine how to help students achieve them.

Thus, researchers and others argued that the state role in education should be to provide clear *standards* for which to aim—that is, state policy documents that would "provide a coherent direction and strategy for educational reform throughout the system" (Smith and O'Day, 1990). During the same time period, a combination of events, including the publication of curriculum standards by the National Council of Teachers of Mathematics, the development of national education goals at the national education summit in Charlottesville, Virginia, and continuing negative reports on student achievement (particularly for minority and poor students) began propelling many educators and policymakers toward a system of state or district academic standards based on high expectations for all students.

At the same time, another movement calling for a whole new outlook on education oversight began to emerge. This vision, borrowed from corporate America, called for state systems to reduce their efforts at regulating the "inputs" of education (such as the number and kinds of books that should be in a library) and instead focus on the "outputs" of the system, especially student performance. Among other things, this would mean de-emphasizing the accumulation of Carnegie units or course credits as a measure of success (since passing a history class in one school was not necessarily the same as passing a history class in another) and instead looking at what students should "know and be able to do."

The standards-based reform movement, as it has evolved and presently exists, is unique in its emphasis on the results or products of schooling. Earlier efforts to judge the quality of educational programs tended to review the "inputs" or investments in schooling. While these aspects of an educational program can be important, standards-based reform looks at what happens as a result of our investment in schooling: What do students know and what are they able to do as a result of their school career? Are these levels of performance impressive, or even adequate, and will they allow the nation's young people to compete on an equal footing with their peers worldwide? The answers to these questions are deemed more important than how many or what kind of courses a high school graduate has completed, how modern her building was, or how well qualified her teachers were.

Standards are important tools for steering an enterprise in an intended direction. Education standards are supposed to show students, staff, and families exactly what is expected of the education system—what schools are supposed to *produce* as a result of their work—or what the *end result* is supposed to be. Thus, states are attempting to show schools what kinds of knowledge and skills they expect students to attain. Although the "results-oriented" standards that states are adopting are new to education, they are a familiar concept in business and industry, where standards for excellence—whether in producing cars or delivering services—are important determinants for the success or failure of enterprises large and small. In fact, it is no coincidence that business leaders have been part of the movement to create new kinds of standards for education.

Student performance standards are also similar to the "profit measure" that businesses use to determine the success or failure of an enterprise. Without standards with which to judge the performance of schools, it is difficult to determine the success or failure of the education enterprise, or to make critical decisions about termination or reallocation of resources.

Finally, the introduction of education standards is a way to unify the entire education enterprise. For example, education standards can serve the student or the education system as they contribute toward the following kinds of purposes:

- ***An Instructional Purpose:*** To set specific standards for what students statewide are expected to know and be able to do at various points in their school careers.

- ***An Organizational Purpose:*** To provide an organizational structure that can tie together the various and disparate education reforms that local school districts are undertaking—particularly those schools that are "site-managed" and are setting their own goals and crafting their own improvement strategies.

- ***A Philosophical Purpose:*** To provide a constant reminder for schools to think about the curriculum and the process of teaching and learning—that is, to remain focused on the achievement of students amid all of the other issues (e.g., budgets, safety, discipline, supplies, facilities, personnel management, parental and political concerns) with which school systems must grapple on a day-to-day basis.

Making Standards Matter, published by the American Federation of Teachers, reports that all states except Iowa are setting common academic standards for students, though these standards vary considerably from one another (Gandal, 1997). Among the states studied for this report:

- In the mid-1980s, **California** developed curriculum frameworks in eight subject areas, and these have been, in effect, its educational standards. The curriculum frameworks are broad and describe what students should know about various content areas at different points in their school career. The state is currently developing new standards in reading/language arts and mathematics.

- In 1996, **Missouri** adopted 73 *Show Me* standards to define the "knowledge, skills, and competencies" that "all students should be expected to achieve" upon high school graduation. Forty of these standards apply to six subject areas (such as mathematics or social studies) and 33 describe how students should be able to apply and integrate basic knowledge and skills.

- In 1992, **New Mexico** developed *Standards for Excellence* that outline challenging expectations for all students in nine subject areas. These standards broadly define the knowledge, skills, and qualities a student should have attained upon high school graduation. The department of education is devel-

Student Performance Standards as a Measure of Success for Schools

"Private, market-based organizations can easily focus on profit as a measure of success, and a basis for making strategic decisions about services to terminate, or where to allocate additional resources. The goal is profit. Public and nonprofit organizations, such as public schools, do not have financial profit as a guiding measure for such decisions. Yet, some organizational theorists argue that predetermined performance standards and goals can substitute for profit as a basis for resource allocation and judgement of success in these organizations. For public schools, student performance standards can serve this purpose. Assessment of student performance, related to standards and goals, plays a key role in determining which districts, schools, and services are performing successfully and which are not. In turn, accountability systems can provide incentives comparable to the dynamics of termination that occur in a market-based system."

C. Wolf, *Markets or Governments: Choosing between Imperfect Alternatives*, 1993

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Study State #1: California

California is home to over five million students, or about one-ninth of the nation's public school students, and the cultural, linguistic, and economic makeup of this student population is among the most diverse in the nation. An economic recession in the late 1980s and early 1990s, coupled with state and local tax limitations, have constrained California's fiscal ability to respond to its growing and increasingly diverse student population. As a result, the state ranks among the lowest in per pupil expenditures.

California is considered a leader, however, in the standards-based reform movement and, since the mid-1980s, has concentrated on ensuring that all students have access to a "rich and rigorous" core curriculum. To support this, the state has developed curriculum frameworks in eight subject areas, as well as documents that describe concrete changes in classroom practices and school organization that can improve the teaching and learning process. Aligning all state education policies in support of curriculum reform has been an important goal that California still pursues, particularly in terms of settling on an assessment system. At the same time, the state also emphasizes its support for local school-based education reform projects.

Both of the California districts that we studied are large, urban, and diverse. The districts were matched demographically and ethnically and have about the same proportion of limited English proficient students (20%) and students eligible for free or reduced meals (35%). Our first study district, *District A*, is performing near the state average on most indicators. Although the district's major focus is raising student achievement through improvements in curriculum and assessment, its most immediate concern is dealing with a state-initiated class size reduction policy. The district will need new teachers who are properly credentialed, but it already suffers from chronic teacher shortages. *District A* has also been a pioneer in the use of school uniforms and has adopted other policies that have reduced school crime, violence, and suspensions. In special education, *District A* has been working to ensure that students with disabilities are included in district assessments, and it has been running pilot programs aimed at moving students from self-contained to resource classrooms through intensive summer reading support.

District B is performing slightly above state averages, which is impressive for a large, urban district of its kind. It has been "restructuring" for about eight years to align curriculum, instruction, and assessment using a decentralized, school-based governance model. Other major issues facing *District B*, as reported in our interviews, include the increasing number of students who do not speak English, old and unsafe facilities, and large achievement gaps between the lowest and highest performing students. This district, too, is struggling with the state's class size reduction policy, both in finding enough properly credentialed teachers and finding enough classroom space to house the additional, smaller classes. *District B* has been a state pioneer in providing inclusive education to students with disabilities. However, it was recently cited by the U.S. Office for Civil Rights and a state review team for programmatic inadequacies.

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oping academic content standards, benchmarks for assessing students' progress at various points in their school careers, and performance standards by which students can demonstrate their knowledge and skills.

- In 1991, **Pennsylvania** identified 53 student learning outcomes that describe what students must know and be able to do to graduate from high school. However, the state is currently replacing these outcomes with new, rigorous academic standards in the areas of reading, mathematics, science, and social studies.

Educational standards such as the ones described above set a vision for what states would like to accomplish in education. Simply developing this vision is often a time-consuming process of building public consensus about and support for the changes being made in education. This process can take several years, and it is affected by issues such as politics and funding. Still, once the standards are adopted the hard work has only begun: standards can provide a direction and goals for an education system, but they are not an end in themselves.

How can states really change education systems in the directions that they envision? Our 1996 report, *What Will it Take?*, discusses six areas of education policy that states can use to influence and support changes in local educational practices:

- ***Curriculum***. States can develop documents—often called curriculum frameworks or guides—to lay out the knowledge and skills that students should attain in different subject areas, and/or to help districts, schools, and teachers develop short- and long-term teaching strategies in different subject areas. Because they have the potential to influence what happens in classrooms, curriculum guides can be important state policy documents. As was noted above, California has curriculum frameworks that have served as its education standards for several years. Our other three study states do not have curriculum frameworks to support their standards, although Missouri is developing them.

- ***Assessment***. Student knowledge and skills can be measured by states in a number of ways and for a number of different purposes, providing states with a powerful tool for finding out if their new education standards are being achieved in local schools. The four states that we studied are still working on changing their assessment systems so that these systems can reveal whether students are meeting new state education standards.

- ***Accountability***. States have a number of ways of holding schools accountable or responsible for meeting state education goals, from setting out mild consequences for failure (the district must submit an improvement plan) to severe (the state will take over the management of districts with long-term, seemingly intractable problems). The four states that we studied are in different phases of revising and implementing their accountability systems so that these systems focus on districts' success or failure in meeting new state education standards.

Missouri's "Show Me" Standards

In 1996, Missouri adopted 73 *Show Me* standards to define what high school graduates should know and be able to do. Listed below are the standards that were adopted in the area of science.

In science, students in Missouri public schools will acquire a solid foundation which includes knowledge of

1. Properties and principles of matter and energy;
2. Properties and principles of force and motion;
3. Characteristics and interactions of living organisms;
4. Changes in ecosystems and interactions of organisms with their environments;
5. Processes (such as plate movement, water cycle, air flow) and interactions of Earth's biosphere, atmosphere, lithosphere and hydrosphere;
6. Composition and structure of the universe and the motions of the objects within it;
7. Processes of scientific inquiry (such as formulating and testing hypotheses);
8. Impact of science, technology, and human activity on resources and the environment.

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- ***Teacher Preparation and Professional Development.*** Changing and improving training programs for future and practicing teachers is a way for states to change and improve classroom teaching and learning practices. The four states that we studied have not yet aligned their teacher preparation and professional development programs with their new state standards for education.

- ***Finance.*** Funding is obviously a powerful incentive for change, but state funding for education has stayed level with inflation in recent years, as will be discussed in the next section of this chapter. Further, debates about general education funding have not, in general, centered around advancing certain kinds of educational approaches, such as standards-based reform, but instead have concentrated on issues of adequacy and equity in funding among school districts within a state (National Association of State Boards of Education, 1997).

- ***Governance.*** States can alter the way they manage or govern the education system as a way of promoting change. For example, two of our study states (California and New Mexico) are encouraging "site-based management," a strategy that gives schools increased flexibility over programming decisions with the ultimate goal of improving student learning. Three of our four study states are also experimenting, to varying degrees, with "charter schools," which are experimental public schools that are operated under a contract (or charter) with the state or local district and may be exempt from many state and district regulations. These kinds of governance changes may or may not have been adopted to support standards-based reform.

It should be obvious that the four states in our study have not yet aligned all of their education policies in support of standards-based reform. A major reason is that the standards-based reform movement is relatively new, and states have carried their reforms out in an incremental way. First, a vision for the future of education in the states must be shaped and adopted in the form of new education standards. Then, various other policy tools are considered one by one, and a consensus must be reached about how each policy should change. For example, many states start by adopting standards, then develop curriculum frameworks, and then examine their assessment and accountability systems. The states that we studied are at different points in this process. As will become apparent, the fact that our study states have not yet aligned all of their education policies in support of standards-based reform means that the influence of standards-based reform on local practices in these states is limited at this time.

That our study states have not yet aligned all of their education policies in support of standards-based reform also means that some of their present policies contain vestiges of older ideas about how to improve education. For example, while new curriculum frameworks may introduce high-level concepts and skills, older state student assessments may be designed to examine whether students have mastered a more basic level of knowledge and skills. This presents a confusing picture wherein the words "education reform" have meant different things at different times—for example, strengthening students' basic skills at one time, and helping students to rise above basic skills at another. This lack of consistency in policy is not only confusing, but it contributes to a cynicism about change at the local level.

Thus, state policymakers who are seeking to improve teaching and learning are also working with the memories of teachers, many of whom have experienced a variety of reform efforts in the past. Changing state requirements can mandate constant shifts in teaching practice and focus. As a new state board of education and a state superintendent are appointed or elected, last year's priorities may fall by the wayside. The material and strategies learned at this year's teacher training workshops may be considered "old hat" three years from now. Therefore, it is not surprising when staff members are skeptical, if not cynical, as yet another innovation is announced from on high.

Researchers have documented growing teacher apathy toward changing their teaching practices to improve student achievement, even in the face of evidence that supports the change. Several researchers have noted that teachers often resist change (Cuban, 1993; Huberman and Miles, 1984; Mann, 1978; Tyack and Cuban, 1996). With new reforms initiated—but not

sustained—teachers, families, and policymakers are developing cynicism toward reform and education innovation (Mann, 1978). This has led teachers to spurn innovations that have proven effective in enhancing student outcomes. If such groups come to reject radical reforms *pro forma*, there is little hope for improving the equity and quality of education. We need to learn how to sustain innovations to reduce teacher apathy toward changing practice.

Studies of the implementation of standards-based reform, such as this one, are examining a relatively new phenomenon. It is too early to assess whether the current wave of education reform will have its intended consequences. Research, however, is on-going. One three-year study of the current wave of reform looked at 12 schools within school districts that were reputed to be active in and capable of supporting education reform (Goertz, Floden, and O'Day, 1995). These schools were located in three different states (California, Michigan, and Vermont). One of the study's findings was that all of the study districts had or were developing outcomes in mathematics and language arts that reflect their state's reform vision. The researchers also found that "teachers do believe that they have been influenced by state policy instruments such as assessments and curricular frameworks, but that these state influences are by no means the only influences on practice, or even the most important influences. Teachers report that their own knowledge and beliefs about the subject matter and their students, for example, generally have a larger influence than state polices" (Goertz, Floden, and O'Day, 1995).

In reviewing their findings, these researchers identified five challenges to policymakers as they attempt to raise standards to support improved student learning (Goertz, Floden, and O'Day, 1996):

- ***Striking a balance between current and desired practice, and between old and new practices.*** While there is strong public support for higher academic standards, the researchers found that both teachers and parents are uncomfortable with a wholesale abandonment of old teaching and learning practices in favor of new strategies.

- ***Achieving a better alignment of state education policy to support standards-based reform.*** When not all states' policies support standards-based reform, local districts receive mixed messages about state expectations. While California, Michigan, and Vermont had made progress in this realm, they all faced major challenges in coordinating the curriculum from kindergarten to grade 12, coordinating the curriculum and student assessments, and strengthening professional development for teachers.

- ***Adopting strategies to improve the quality of education for ALL students.*** More effort will be needed to ensure that standards-based reform works to the benefit of all students, including those who have traditionally done poorly due to problems in their schools, families, and communities.

- ***Providing a stable political environment that is supportive of standards-based reform.*** Educators need time and stable support to change and improve their practices. Meanwhile, new governors are elected or new state superintendents of education are named with their own agendas for improving the education system. Building public support for standards-based reform and building support mechanisms *outside* the political system are two examples of ways to sustain the momentum.

- ***Building the capacity of school districts, schools, and teachers to improve student learning.*** The researchers found that although state policymakers acknowledge the importance of capacity building, most state strategies to accomplish this are too narrowly focused. Professional development strategies need to promote and sustain teacher learning and instructional change more comprehensively over the long term.

Finally, how has the special education community been involved in standards-based reform? Based on last year's findings from 18 states, special educators have not played a major role in developing standards in most states. Most typically, special educators have been asked to review various materials and make suggestions about how these materials might be pertinent to or adapted for students with disabilities. There are exceptions to this generalization, but most typically, special educators have not been important players as new education standards have been shaped in the study states.

Study State #2: Missouri

Missouri is a predominantly rural state with 525 school districts and a K-12 student population of 875,000, about 100,000 of whom are served by special education. The current governor has been described by members of both parties as an excellent education governor, and education reform was one of the planks of his election platform. The Missouri Legislature has passed two major general education reforms during the past ten years. The most recent, the *Outstanding Schools Act* of 1993, created a comprehensive framework for standards-based reform in education. Among the actions taken thus far as a result of this legislation are the adoption of new education standards (the *Show Me* standards) and the drafting of new curriculum frameworks, new state assessments, and a realignment of the state's accountability system. Of our four study states, Missouri has the "highest stakes" accountability system. For example, if individual schools are found to be "academically deficient," a state-appointed audit team can recommend recall elections for district school board members or suspend contracts of personnel.

The two school districts that we studied in Missouri are rural and were matched demographically; about 30% of each district's students qualify for a free or reduced lunch. Both districts are experiencing increasing enrollments as a result of urban flight. Beyond these similarities, the two districts have different needs and concerns. *District A* was only provisionally accredited by the state during the 1993-94 school year, due in part to a concern about student test scores and the district's dropout rate. During interviews, all types of respondents voiced concern over the increasing numbers of students entering the school system who are ill-prepared, ill-disciplined, or otherwise at risk of school failure. Other major issues included teacher shortages and facilities development. During the 1995-96 school year, the district participated in a major national project to include students with disabilities in the general education classroom.

District B's last state review was generally positive, citing strengths such as its optimum class sizes, low dropout rate, and high level of student achievement. Major issues for the district include improving student test scores and adopting a number of education reforms, including school-to-work initiatives and block scheduling. The district uses self-contained classrooms and resource rooms for special education students in addition to providing support in the general education classroom, an approach that many teachers describe as "partial inclusion." The district provides cross-categorical programs for students with disabilities, meaning that services are provided as needed regardless of a student's "disability label."

The limited role of special education in developing new education standards is significant because these standards are intended to apply to *all* students, not just the highest achievers. In fact, education reformers assert that schools should *start* with the idea that all students can achieve at high levels, rather than that they cannot. New standards should challenge each child fully, and recognize progress and achievement throughout a student's school career. The lack of guidance from states about how to apply new education standards to students with disabilities means that the districts we studied are also not far along in their thinking about this point. This idea will be explored in greater depth in the final chapter of this report.

Cost Containment as It Influences Education Reform

As we have discussed, standards-based reform, in its inception, emerged as a theory about how to reform the nation's public education system. The theory contends that if states set high standards for student achievement and promote them in a systemic way, then school practices and student achievement will improve (Smith

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and O'Day, 1990). Inherent in this idea is the assumption, backed by research, that virtually all students can learn challenging content and complex problem-solving skills *if* their school is capable of providing a sufficiently challenging curriculum and excellent instruction (Smith and O'Day, 1993). In fact, these proponents saw standards-based reform as a way to reduce long-standing gaps in student achievement based on race and poverty by striving to provide all students with access to the finest schools and teachers.

It can be argued that standards-based reform, in this original formulation, is based on an idea of unlimited funding—the nation is to do what is necessary, no matter what the cost, to assure that all students have *access* to the kind of education program that will support them in achieving at substantially higher levels. In fact, early standards-based reform proponents argued for the development of "opportunity to learn" standards that would help states to understand whether schools are providing students with adequate (or better) "opportunity to learn" concepts and skills (Smith and O'Day, 1993). Such standards could be a way of holding schools accountable, providing assistance, and making decisions about resource allocation.

As the idea of standards-based reform was eventually picked up and used by almost every state, non-educators, particularly business people, became involved in the movement and were supportive of the concept of standards for the education enterprise. Many people approved of a "get tough" attitude about holding schools to high standards and looking at the "outputs" of education. But the "opportunity to learn" standards and their focus on the "inputs" into education were not so popular. Critics argued that standards such as these might create a new obligation on the behalf of state governments to students—*and a promise that would be impossible to fund.* In addition, the various interested parties could not agree on what the "opportunity to learn" standards would look like; in fact, some argued that uniform standards couldn't be developed given the diversity of local circumstances.

After all of these debates, the question of the *cost* of an effective standards-based reform movement remains largely unexplored. A small number of policymakers have assumed that resources could be reallocated by states and local school districts as they adopted different approaches to teaching and learning. For example, only 13 states require and fund intervention programs to help low-performing students reach the state standards (Gandal, 1997). But more school districts are now disputing the notion that they can meet the new education standards without additional funding. In May of 1997, the New Jersey Supreme Court found the state's remedy to fix its school finance system was unconstitutional, citing the fact that the state has failed to supply its 28 poorest school districts with enough money to overcome the disadvantages faced by their students in trying to meet the state's education standards (Hendrie, 1997). The idea of inadequate funding for standards-based reform is also the basis for a lawsuit in the state of New York.

More Funding for Education?

Former New York governor Mario Cuomo had this to say about providing increased funds so that all students can reach the higher education standards that states are setting:

> "If we're doing this to set the bar high, we're going to have to have all of the things we need to get the children over that bar. If we pretend that we can succeed by providing the things that do not cost money and not providing the things that do, who are we kidding? We're hypocrites."
>
> *Education Week*, October 22, 1997

On the other hand, Eric Hanushek, professor of economics and public policy at the University of Rochester, presents a different point of view in arguing that:

> "Instead of searching for new sources of funds, policymakers should ask why schools are not more productive with the funds they currently have. Small gains in efficiency and productivity might well negate the need for additional funding."
>
> *Making Schools Work: Spending and Student Achievement*, 1995

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The unanswered questions about adequate funding to support standards-based reform are posed within the context of cost containment measures. States and school districts find it difficult to fund K-12 public education in its present form. The cost of education is rising, as enrollments and the proportion of students with special needs have increased (U.S. Department of Education, 1996). Yet the growth in school revenues has barely offset enrollment growth and inflation. Nationally, the inflation-adjusted revenue per pupil remained unchanged between 1991 and 1995 after steady years of growth (Gold, Smith and Lawton, 1995). State support of education decreased during this same period, driving up the local share of education funding, placing increased pressure on local property taxes and causing some taxpayers to question education expenditures.

How could it happen that the issues of funding and the widespread support for higher academic standards are so much at odds? One reason lies with the widespread dissatisfaction with the public K-12 education system (Public Agenda Foundation, 1996). People want to see the education system substantially improve in ways that they can clearly understand, but there is public mistrust about the way current education dollars are spent, a sentiment that the education system is already costly, and a reluctance to devote more dollars to a system that appears to be malfunctioning. In addition, as the population ages, fewer tax-paying citizens have children in the public schools, meaning that fewer people may be willing to support tax increases for education. And many people simply feel that taxes are already too high.

A second reason for the disjunction between standards-based reform and funding is found within the process of appropriating state funds. In some instances, as state policymakers and department of education personnel invent new standards-based reform initiatives that have budgetary implications, they may not be in communication with state legislative committees. Thus, the people in charge of making appropriations decisions may not understand the request for additional dollars and thus turn it down. And as with any funding request, legislative appropriation committees must also balance additional education funding requests with other budgetary increases that the public supports, such as adequate funding for Medicare and the building of prisons.

Finally, there is a perception that any bureaucracy, such as an education agency, has its own motivation to survive and grow, meaning that additional requests for funding may be "layered on top of" regular appropriations for education. State appropriators may look to have the state education agency shift funds and priorities within the department, redeploying funds that had been used in support of older education initiatives, rather than grant a request for more funding.

Another important factor in the pressure to contain education costs is special education. Like standards-based reform in its original formulation, special education is founded on the idea of unlimited funding. Under *The Education for All Handicapped Children Act* of 1974 (now amended to *The Individuals with Disabilities Education Act*), all children with disabilities must have access to a free, appropriate public education. Thus, all school districts must provide *all* eligible students with the special services that they need to pursue their education. This is true even when state funding for special education is decreased or capped and the number of special education students increases in a local district. The money to serve all of these students *must* be found by local districts and schools.

The growing cost of special education is a factor in the tight fiscal climate that inhibits increased funding in support of education initiatives such as standards-based reform. In fact, there has been a backlash that questions special education's protected funding levels and what special education students really attain as a result of their schooling and the money that has been invested in their education. A *U.S. News & World Report* article ("Separate and Unequal") of December 13, 1993 is suggestively subtitled "How special education programs are cheating our children and costing taxpayers billions each year." More recent articles question the number of students who are labeled as "learning disabled" and thus receive special services from schools at taxpayers' expense (see, for example, Shalit's article in *The New Republic*, August 15, 1997).

District Responses to Cost Containment Measures at the State Level

What are the effects of state cost containment measures on the local school districts that we studied? We

Difficulties in Financing Education in California

California has trouble funding its education system for a number of reasons. Major changes in school funding resulted from the passage of Proposition 13 in 1978, which cut property taxes by nearly 60 percent. School districts lost their authority to generate revenue for schools through property tax levies, and it became more difficult for local school boards to raise money. As a result, most school districts became largely dependent on the state General Fund, which has increased at a slow rate in the last ten years.

For several years, California has sought a permanent solution to ensure economic stability and equity for local school districts. In 1988, the voters narrowly passed Proposition 98, which mandated that approximately 40 percent of the state's general fund budget be set aside for K-12 public schools and community colleges. Proposition 111 was passed in 1990 to help determine the minimum funding guarantee for schools in years when state general fund revenues are low.

Since the passage of Proposition 98, state education funding has remained relatively steady at about $4,200 per pupil. But schools have had to absorb cost-of-living increases for salaries, wages, and services, and the impact of inflation has undermined the ability of schools to maintain existing programs. In some recent years, budget shortfalls have limited the money available to schools, even under the provisions of Proposition 98. One consequence has been to pit education against other social services and public agencies for scarce state funds. Another result has been a trend of inadequate funding for school districts and a parallel slowdown in the pace of educational reform.

California started a state lottery in the mid-1980s as an additional source of educational funding. In the initial years, the lottery added about seven percent annually to total funding for K-12 schools, but its contribution has gone down to between two and three percent in recent years because of declining participation.

Recent upturns in the state's economy have provided more money to local districts. But educators worry that yearly increases cannot compensate for decades of inadequate funding, nor can they be counted on to permanently fix a system of inadequate funding.

found that the issue of adequate funding for education intensifies at the local level, where there are additional local pressures that demand solutions. Our study districts are coping with rising student enrollments, more diverse student populations, and increasing numbers of children with special needs—meaning that the districts are pressed to revise their programs and sometimes provide additional services without significant increases in state funding. This has two major effects: *the study districts must both raise additional funding and they must provide existing and additional services more efficiently and economically.*

As states begin to implement standards-based education reform, our study districts have been forced to seek outside, discretionary funding from state, private, and federal sources to narrow the gap between the money they need for general education and the funding they get from the state and from local property taxes. Districts seek funding from a wide variety of sources to help them better serve their increasingly diverse student populations. Thus, one driving force for our study districts is the need to raise more money to serve the students in their schools.

But when our study districts obtain money for outside sources, they must adopt the educational approaches that the outside funders are supporting. Every grant for funding comes with its own requirements, and, therefore, districts may find themselves striking out in different programmatic directions from what the states have intended in enacting standards-based educational reform. While these programs can bring valuable perspectives, intense district involvement in raising outside money is distracting to the education enterprise. A focus on writing grant proposals can splinter district en-

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Study State #3: New Mexico

New Mexico's diverse and primarily rural population is thinly scattered throughout the state. In 1995-96, the state served 328,672 students through 89 school districts, with approximately 13% of these students receiving special education services. In 1992, New Mexico joined the standards-based reform movement by adopting *Standards for Excellence* to establish challenging expectations for all students by broadly defining the literacies, attitudes, and attributes a student should have upon high school graduation. Implementation is guided through a regulatory manual, *YES*, that lays out requirements for local school districts, including the requirement that districts carry out strategic planning processes to define their own goals as well as meet the state standards. Accountability is managed through the accreditation process, which has been revised to examine whether districts are meeting their own goals as well as those of the state.

The New Mexico districts selected for this study are in medium-sized towns with a rural flavor. Both districts were matched demographically and enroll roughly the same proportions of Hispanic (60%), Caucasian (35%), and Native American (2%) students. Both districts have a significant proportion of low income families. The major general education issues facing *District A*, as reported in our interviews, include the many students arriving from Mexico (particularly those who do not speak English or have not had any previous education and/or need special programs), additional classroom space for the new students who need special programs, and dropout prevention programs. Its current education priorities are to promote school-to-work opportunities, require competency in more than one language, and increase test scores and the graduation rate. The district is involved with a number of initiatives to improve instruction for students with disabilities, including a national project on inclusion.

District B's major education issues revolve around improving its curriculum and better serving students who are at risk of school failure. Citing a lack of consistent direction and focus from the state, the district is currently developing its own high school student exit standards and a K-12 performance-based curriculum, as well as developing portfolio assessments. *District B* has also experimented with site-based management for some years. In the area of special education, this district is developing more inclusionary programs and improving assessment services for children who do not speak English.

ergies and encourage the development of teachers who are good grant writers, and not the development of teachers who can think critically about the curriculum. A system that relies on outside funding also inequitably rewards school districts that are skilled at writing grants.

One purpose of standards-based reform is to introduce common goals and thereby reduce the fragmentation and lack of focus that can accompany the presence of multiple educational improvement projects scattered throughout school districts and the state. But in the states that we studied, this task will be challenging, as our study districts tend to focus their work on initiatives that are supported with additional funding or other resources. Large districts in particular, such as the two California school districts that we studied, have the capacity to attract special grants and projects through federal and state grant programs and private foundations. Both California districts told us that they have received early and continued assistance from a number of private foundations and national entities to support their work. In some of our study districts, reforms were described by the funding agent; for example, "We are an 'Accelerated' school" or "This is a 'Pew' district" (meaning that the school or district has received support from the national Accelerated School movement or the Pew Charitable Trust).

Many districts, including some of our study districts, have found support for standards-based curricular reforms through national projects such as the *New Standards Project*, which focuses on the development of performance standards and assessments, and the National Science Foundation, which supports reforms in mathematics and science. Some study districts have received support from national foundations. For example, the Pew Charitable Trust and Edna McConnell Clark Foundation are supporting efforts in one California district to adopt educational reforms and provide teacher development. One New Mexico district has received financial support from the Panasonic Foundation over the last ten years to provide teacher training and experiment with site-based management.

To the extent that these efforts reflect the state's standards, the districts that we studied are "in sync"

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Study State #4: Pennsylvania

Pennsylvania is a large and heterogeneous state. While major urban areas such as Philadelphia and Pittsburgh contain almost two-thirds of the state's population, Pennsylvania also has the largest rural population of any state, composed of small communities scattered across a large geographical area. Half of the state's school districts are considered rural. In 1993, Pennsylvania adopted an "outcomes-based" education system that was intended to broadly define what graduating students must know and be able to do. However, this system engendered a great deal of controversy, as critics felt that some of the outcomes were vague or addressed non-academic student attributes. The system was subsequently revised and supported by a state-required local planning process in which school districts were to set their own high academic standards. Since then, the state, under a new governor, is replacing the state-level learning outcomes with rigorous, measurable academic standards in discrete content areas.

The Pennsylvania districts in our study are suburban and rural in nature, located outside of medium-sized cities. The districts were matched by size and student population, having enrollments of about 7,000 students each, with 35% of their students eligible for free or reduced meals. The students are overwhelmingly Caucasian and many are from relatively affluent families. *District A*'s major challenge is to provide adequate facilities for an increasing student population. It recently had to raise taxes to support a $72 million renovation/capital improvements project. At the same time, the district must serve an increasingly diverse student body that is bringing a number of social problems, such as drug and alcohol abuse and teenage pregnancy, into the schools. Among its reforms are a restructuring of elementary and middle schools, a focus on technology, and an infusion of character education throughout the curriculum.

District B is facing many of the same challenges as *District A*. In response to its growing enrollment, the district has undertaken an $88 million building program. *District B* is also considering delivering school-based mental health services and is restructuring its secondary curriculum to include middle schools and school-to-work programs. It has undertaken major initiatives to adopt developmentally appropriate practices for young learners, to infuse technology into the curriculum, and to strengthen professional training opportunities for school staff.

Both districts are responding to a major change in the state's funding of special education by bringing students with disabilities back from regional programs to their home districts. Both districts are building up their services, with an emphasis on creating inclusionary programs in which general and special education teachers co-teach all students in the same classroom. *District A* has focused on serving more lower-functioning students with disabilities in general education classrooms with the assistance of special aides. *District B* has placed a range of students receiving categorical services (for example, Title I or special education) into the general classroom and tracked the impact of these inclusionary practices through annual testing of students' academic and social skills.

their states' reform efforts. Where these initiatives differ from state standards, the districts, in turn, steer the curriculum away from state goals. At worst, the stated goals of some projects are antithetical to the goals of others. For instance, two California high schools have grants to promote the inclusion of students with significant disabilities into the general curriculum and school program. Meanwhile, the same two schools are also participating in the *New Standards Project*, an effort that, they believe, does not apply to students with significant disabilities.

Sometimes *state-funded* education programs can distract school districts from the new state education standards. We found an instance of this in one Missouri district, where state funds are supporting an elaborate animal husbandry curriculum that was proposed by a biology teacher. Although a showpiece of this district, district administrators were not able to describe how this curriculum related to the state's *Show Me* standards for education.

Another potential source of disjuncture between standards-based reform and federal and state-sponsored

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initiatives is found in school-to-work initiatives that are designed to link the high school curriculum with real-world work skills. Data from our first year of study suggest that within the state departments of education there was very little coordination between the federal School-to-Work initiative and developing state education standards (Center for Policy Research on the Impact of General and Special Education Reform, *State Education Reform and Students with Disabilities*, 1996). Yet virtually every school district that we studied was involved in a school-to-work initiative, revising their curricula based on the skill objectives outlined by SCANS, the Secretary's Commission on Achieving Necessary Skills (U.S. Department of Labor, 1991). Again, our study districts were not able to describe a link between their school-to-work efforts and state education standards.

Thus, one major effect of cost containment measures is that our study districts must seek outside funding. A second major effect is that it drives our study districts to find ways to serve a diversity of students more efficiently, effectively, and economically—a point that will be discussed in some depth in the next chapter as we look more closely at local district actions and priorities. The important point at this juncture is that state cost containment measures appear to have a significant impact on the local school districts that we studied—though not necessarily in support of standards-based reform.

In this chapter, we have looked at two major priorities for education in the states that we studied: standards-based reform and cost containment. We have seen how these goals can confound one another, since standards-based reform as a theory assumes sufficient funding and thus can bump against the reality of state efforts to contain education costs. We have also discussed the fact that state cost containment measures, when combined with additional local pressures such as rising enrollments, are driving the districts that we studied to seek outside funding. And when districts receive outside grants, they are required to adopt specific educational approaches that may or may not match up with state-level education priorities.

Now that we have discussed the impact of cost containment measures, we will turn to look more closely at the impact of standards-based reform and its effect on the local districts that we studied. Thus, the next chapter will examine two sets of reasons why standards-based reform is having a limited impact on our study districts. During this process, we will review the kinds of educational reforms that our study districts are undertaking by their own initiative to better serve their increasingly diverse student populations.

Chapter II. How the Districts We Studied Are Responding to State-generated Standards-based Reforms

Chapter One examined two major state-level education priorities in the states that we studied: 1) raising student achievement through standards-based reform, and 2) containing education costs. We have discussed the fact that state-level pressures to contain costs have forced our study districts to seek funding from outside sources. Now we will look at the programmatic priorities of our study districts and how they are responding to state-level standards-based reform.

As states reform their education systems with the intention of raising student achievement, they obviously intend that their new policies will change local district practices. To what extent is change evident in the districts that we studied? We found rather large and interesting gaps between state actions and district realities for a number of reasons. One group of reasons has to do with the *kinds* of actions that our study states are taking. In the states that we studied:

- State-generated standards and curricula frameworks are often too general and abstract—and too often lack guidance about effective instructional techniques—to effectively shape classroom practices and meet teachers' needs to improve their educational programs.

- State standards may not influence local practice in the short term if these standards are debated at length, developed slowly, and are subsequently revised and changed, causing local districts to develop a "wait and see" attitude toward them.

- States have not changed the *kinds* of policies that tend to affect district practices.

Because of the factors above, the districts that we studied are not responding to standards-based reform with the same kind of immediacy with which they must respond to the pressures of cost containment coming from the state level.

But there is another group of reasons why standards-based reform may not have the kind of impact that our study states intended. Specifically, the school districts that we studied have their own immediate concerns in terms of: 1) local pressures to contain costs (which is affected by state cost containment measures), and 2) the need to better serve an increasingly diverse student population. It is these two immediate issues we found to be driving local educational practices. To the extent that our study districts have the *capacity* in terms of leadership, personnel, programs, and funding to attend to their most immediate pressures—and then to take on other challenges as well—they are more or less influenced by state-level standards-based reform.

Our findings should be viewed within the context of past research suggesting that local school districts most often respond to state requirements with minimal compliance (Firestone, 1989). School districts are less likely to respond when these requirements are perceived as ambiguous, when the consequences for *not* complying are not seen as serious, or when districts simply lack the capacity to respond. We saw examples of all three of these circumstances in the districts that we studied, as we will explain in the following section. Local capacity is particularly important, as penalties have little effect when educators lack the skills to implement a mandate.

However, districts do adopt state initiatives when the local leadership is focused in its vision, proactive, sees an opportunity in the state requirement, and is capable of responding (Firestone, 1989; Fuhrman, Clune, and Elmore, 1988). The *local context* is key in examples where school districts respond with enthusiasm in car-

rying out a state requirement. When conditions are right, a new state requirement can be carried out swiftly and thoroughly, relatively speaking, at the local level. But these findings come out of research examining education reforms that did not represent a radical departure from old ways of doing business at schools. Conversely, the standards-based reform movement *does* represent a new way of looking at schools, teaching, and learning, meaning that the specificity of state documents and the kinds of guidance and support that they give take on new importance.

Finally, what evidence would demonstrate that our study districts were implementing standards-based reform? At this early stage in the reform movement, we were looking for evidence during our interviews for the degree to which local respondents knew about and local educators were thinking about the standards when revising curricula. We relied on questioning practitioners rather than looking at any possible gains in student achievement because state policies, particularly assessment systems, are not yet fully aligned with the new standards in our study states. This means that a cohort of students has not yet passed through a thoroughly realigned education system in our study states.

When looking at possible influences at the local level of standards-based reform, we also considered the three kinds of purposes for education standards that were mentioned earlier in Chapter One:

- *Regarding the Instructional Purpose:* Were local educators aware of the state standards and what students statewide are expected to know and be able to do at various points in their school career?
- *Regarding the Organizational Purpose:* Did local educators perceive that the state standards were providing an organizational structure that could tie together the various and disparate education reforms that local school districts are undertaking?
- *Regarding the Philosophical Purpose:* Did local educators perceive that the state standards were pushing them to re-examine their approaches to teaching and learning and to renew their focus on student achievement?

Helping Schools to Carry Out Reforms

It appears from our research that schools are having an easier time adopting education reforms that provide very specific guidance on new instructional techniques and the curriculum. Other research has shown that to be successful in adopting innovations, teachers need not only the "big picture," but also details about how they are expected to change their practices (Firestone, 1989). This may be one important reason why state-level, standards-based reform documents that are broad in scope and lack details about instructional techniques are having a limited impact on local school district practices in the states that we studied.

It is notable that other research is revealing similar findings. For example, the RAND Corporation, which is studying the ways in which schools are implementing reforms sponsored by the New American Schools, has found that schools are experiencing difficulties carrying out designs that expect teachers to construct their own instructional strategies and curriculum. Other studies are reaching the same conclusion. (Olson, April 30, 1997).

The Limited Impact of Standards-based Reform on Local Districts, Part I:

Policies and Actions Are Not, at Present, Optimally Designed to Influence Local Practices in the States that We Studied

This section will explore three reasons why state actions are having a limited impact on the local districts that we studied. *The first reason is that the state's standards and curriculum frameworks set general and broad parameters for the curriculum, whereas the districts may seek more specific and concrete guidance on how to improve instructional practices.* As a preface to this discussion, it is interesting to note that district-level respondents in only one of our study states—California—told us that they had found state-generated documents helpful to their work. And in California, it was not the state standards (as contained in the state

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curriculum frameworks) that local educators found helpful. The following example will help to illustrate why this might be so.

As we have discussed, California's curriculum frameworks in various subject areas serve as its education standards. These curriculum frameworks lay out the broad concepts that students should understand; for instance, the Science Framework discusses what science is and describes what students of various grades should know.

For example, in response to the question "What is matter, and what are its properties?," students in kindergarten through grade three should come to understand that:

> Matter is the name we give to all the stuff in our physical world. From stars to dust, from elephants to fleas, everything is made of the same basic building blocks. Although the scale of our universe ranges from the very large to the very small, all of it is matter....All matter has properties that can be observed, defined, and recorded. Matter occupies space, it has substance, and we can measure its weight....All things that we can sense directly are constructed of progressively smaller things. We use tools like microscopes, telescopes, or thermometers to perceive things for which our senses are poorly adapted or which exist beyond the range of our senses (California Department of Education, 1990).

The Science Framework concludes with some observations about the effective teaching of science, but these descriptions are relatively brief, as the curriculum frameworks are not intended to be "how to" instructional guides for local schools.

When we questioned our California study districts about state documents that have affected local practices, our respondents did *not* cite the state's education standards as laid out in its curriculum frameworks. Rather, the people with whom we spoke said that a different set of documents (*Caught in the Middle*, *It's Elementary!* and *Second to None*, all published by the state education department) had an impact on their work. These latter three reports describe concrete changes in classroom practices and school organization that can improve the teaching and learning process. For example, *Caught in the Middle* recommends specific instructional strategies for middle school students, as illustrated by the following guidance given in the text:

> *Questioning Strategies Which Encourage the Development of a "Thoughtful Classroom"*
>
> When teachers rely on questions with short, correct answers and call on students with their hands raised, they are encouraging recall in some students and ignoring others entirely. In contrast, teachers should:
>
> - Ask questions which have a range of appropriate responses, all of which require some explanation of the student's thinking;
> - Wait five to 10 seconds for all students to think, and then;
> - Call on students without anyone raising hands.
>
> By doing this, several important purposes are accomplished:
>
> - All students know they are expected to think;
> - They are given the time and silence to think;
> - All students must be ready to communicate their thoughts.
>
> California Department of Education, *Caught in the Middle: Educational Reform for Young Adolescents in California Public Schools*, 1987

A final point of interest is that although the three reports *Caught in the Middle*, *Second to None*, and *It's Elementary!* and the curriculum frameworks are all intended to support a common education reform agenda throughout California, the teachers that we interviewed did not perceive any connection between the former and latter sets of documents.

We found a good deal of evidence in our study sites that districts and their staff find it easier to take on curricular initiatives that include more concrete *instruc-*

tional strategies, rather than trying to take on broader student standards and goals that do not explain in some detail how these goals can be met. In fact, as should become clear in the last part of this chapter, many of the reform initiatives undertaken in the districts that we studied involved changes in instructional methods more than changes in the content of the curriculum. Further, the standards-based approaches that have taken hold in our study districts (primarily federally and nationally supported efforts in mathematics and science) may have been adopted more quickly because they come with suggested instructional methods.

A second reason for the limited influence of standards in our study states is the newness of the standards, as well as the fact that some districts have taken a cautious attitude as state standards documents have been debated at length and have sometimes been revised or changed. As an example, respondents in the two Missouri districts that we visited were aware of the state's *Show Me* standards and the curriculum reforms that they represented, and they predicted that these standards would impact local schools. But teachers in one district told us that they have taken a "wait and see" attitude toward using the *Show Me* standards because these standards have been debated at length across the state.

In Pennsylvania, the development of education standards was a particularly controversial process. The state developed an "outcomes-based" education system earlier in the 1990s, but it engendered a great deal of controversy as segments of the public felt that some outcomes were worded vaguely and addressed non-academic qualities in students. The outcomes were subsequently revised, but the state is now in the process of replacing this system with a set of more rigorous academic standards. As of 1996, district officials in our case study sites reported a lack of guidance from the state and said they were relying instead on national standards in developing curricular goals.

New Mexico's standards-setting process has also been difficult at times. The state originally had developed "Competency Frameworks" to help districts revise curricula in line with the state's new education standards, but districts complained that these frameworks were too broad to communicate what students should be held accountable for at high school graduation. More specific documents are now being prepared and adopted, but one New Mexico school district that we studied is developing its own school reform initiative because of what it perceives as a lack of a consistent direction and focus from the state regarding curriculum requirements.

A third reason for the limited influence of standards-based reform is that our study states are not taking actions in policy areas that are most relevant to local concerns and/or most likely to affect local practices. One striking example of a mismatch between state actions and local reality is in the area of teacher policy. Our study states are concentrating on making improvements in the *quality* of the teaching force, but in our study districts, the most pressing issue is *teacher shortages*, especially in special education. When the most pressing problem is recruiting enough credentialed teachers to staff a school, issues of improving teacher quality must, unfortunately, take a back seat. Many of the rural and urban districts that we studied struggle to maintain a fully credentialed faculty, either because salaries are low, or turnover is high, or because teachers who will teach in rural or urban schools are in short supply. The urban and rural districts in this study have been forced to request waivers or emergency credentials in order to staff their programs, and they all had teachers and/or administrators who were not fully credentialed or did not have the proper credential for the position that they were holding. The urban California districts in this study regularly hire hundreds of teachers on emergency certificates each year. The rural districts in Missouri must not only be concerned about attracting and keeping appropriately licensed teachers, but also about the number and types of endorsements teachers need for their licenses, since the districts must use a small staff flexibly from year to year as student needs change.

The states that we studied have some initiatives underway to address these problems. For example, New Mexico is trying to address statewide teacher shortages by increasing teacher salaries. California created a program to reduce the attrition rate of beginning teachers by offering the support of mentors, peer discussion groups, and performance-based assessment during the critical first two years of teaching. This program uses on-going assessments that inform and guide the sup-

port given to beginning teachers, rather than relying on more traditional district evaluations that affect the teacher's employment and credential status.

But state-level policies and programs can also make matters worse. In California, chronic teacher shortages have been exacerbated by the class size reduction policy that was enacted by the state legislature in the spring of 1996. This voluntary program provides funding as an incentive to reduce class sizes for kindergarten through grade three to no more than twenty students. As the two urban districts that we studied reduce class sizes through this state incentive program, their biggest worry is whether or not they will be able to find enough properly credentialed teachers.

Another important way that states can affect local educational practices is through their *assessment and accountability systems*. Such systems are intended to monitor school districts' progress toward meeting state requirements and goals. Assessment and accountability systems are powerful because they can hold districts,

The Influence of a State's Accountability System on Local Districts

Accountability systems can be powerful tools for states to use in influencing local school practices. Such systems hold schools responsible for state goals and spell out the consequences for success and failure in this venture. Yet in interviewing district officials, we found the level of awareness of state accountability systems varied greatly. The factors that influenced this awareness were:

The size of the district. Large districts (such as those in California) have greater internal capacity and are less dependent on the state for support and guidance in many policy areas. In the small, rural study districts of Missouri, all district personnel and parents knew about the state's accountability system.

Whether or not the district has its own accountability system. Three districts in our study have their own accountability systems, and as a result they seemed less aware of the state system. By far, their own systems, which were an active presence *every* year (rather than the state's three to five year review cycle), overshadow the state's system. On the other hand, the five districts without their own accountability systems were more familiar with the state's accountability system.

The consequences attached to state accountability models. If a district is unconcerned about consequences for poor performance on state accountability measures, it may be less concerned with or interested in the state system. Of the four states, California and Pennsylvania have theoretically the "lowest stakes" accountability systems, meaning that the consequences for not following the state's directions were not perceived as serious. In California and Pennsylvania, personnel outside of the district central office were unable to describe the state's accountability system.

More pressing, competing issues in the district. Of the eight study districts, three have been grappling with the challenges of providing adequate facilities for growing student populations (one in Missouri and two in Pennsylvania). In the Missouri district that was building a new school, personnel were less aware of the state accountability process than was true in the other Missouri district. Likewise, district personnel in the two Pennsylvania districts focused on facilities development as a more pressing issue than the state standards and the state-required strategic planning process for local districts.

The degree to which the district is performing successfully on the state indicators. Of the four study districts under accreditation systems (in Missouri and New Mexico), one was provisionally accredited. The provisionally accredited district in Missouri was very aware of the state's accountability system and the areas in which the district was found deficient, while the other three districts were aware of but less focused on the state's accreditation process.

More than one of the factors above was operating in each of the districts that we studied. We believe this explains the variation that we found in district awareness of state accountability systems.

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schools, and students up for scrutiny and can make them look good or bad to parents and the public, depending on how schools and students measure up on state assessments and on how severe the consequences are for poor performance. At the time of this investigation, none of the states in our study had finished changing its accountability system so that the schools would be fully responsible for meeting the new standards that states have set for student achievement. In places where schools are held responsible by the means of *older* tests that are not aligned with the new standards, educators will work with an eye to doing well on the *older* tests—and not on meeting the new state standards.

For example, at the time of this study, one Missouri district had received a poor accreditation rating from the state, in part because of low student scores on a statewide assessment that was not yet aligned to the state's new standards. In that district, the *older* statewide assessment was seen as driving curriculum reform to a greater extent than the state's *Show Me* standards. District officials were directing teachers to intensify their instruction in the areas in which students did poorly, and this work was to be completed before the district focused on incorporating the new state education standards into the local curriculum.

In summary, standards-based reform, in its current phase of evolution, is having a limited effect on local practices in the states that we studied.

The Limited Impact of Standards-based Reform on Local Districts, Part II:

The Local Districts We Studied Respond to Their Own Pressures and Priorities

The school districts that we studied are working to improve their educational programs with one eye on state requirements and priorities, and the other firmly fixed on their most pressing and immediate local concerns. Our study districts are adopting a range of new educational approaches for different reasons, which often include some combination of the following:

- Districts may have been able to raise outside funding that dictates that they adopt a particular approach to teaching and learning.
- The state-level standards-based reform is relatively new and is still being developed, whereas other kinds or waves of education reform have been around longer and are having a more significant influence on local practice.
- A particular educational improvement strategy comes with concrete—and sometimes prepackaged—instructions for improving instruction and the curriculum, meaning that schools can readily pick up and use.
- A strategy for improving curriculum and instruction is well suited to supporting learning for a diverse student population.

Thus, the programs that the study districts are adopting may match up with state-level education priorities, but these programs are often adopted independently of this consideration.

As we consider what kinds of reforms the schools that we studied are undertaking, it is important to notice that these are primarily *locally*-initiated reforms. Even when these schools have responded to state-initiated reforms (as in the case of some of the school-to-work initiatives that will be described), they are state-initiated reforms *other than* standards-based reform. A second point to notice is how these reforms help schools to serve diverse student populations with different learning styles and goals.

At the elementary level, some of the districts that we studied were undertaking reforms that emphasize "developmentally appropriate" practices that are designed to match and build upon the ways that children actually learn and develop. In addition, the elementary schools in both of the Missouri districts that we studied have been influenced by the *Accelerated Schools* movement, which was developed as a way to promote academic excellence among disadvantaged students. Shared responsibility and decision making among school staff, students, parents, and the community are big parts of this model. An elementary school in one Missouri district received a state grant to create an *Accelerated School* several years ago. The other district has applied for an *Accelerated School* grant for one of its elementary schools.

In California, both of our study districts have undertaken literacy initiatives to intensify reading instruction in the early grades. Also, one of the New Mexico districts we visited is focusing its development of a new performance-based curriculum on kindergarten through grade three, where they feel the impact of improved instruction would be the greatest.

At the middle and junior high school level, several of the districts we visited have organized their grade levels and curriculum around the "middle school concept," which organizes students and teachers into teams and integrates the curriculum into overarching themes, offering students the opportunity to actively explore different subjects in greater depth. For example, the idea of organizing students into teams has dominated one New Mexico district's middle school reform. A group of approximately 100 students is assigned in four teams to four teachers for all of their academic classes. One Missouri district has opened a new middle school that offers a wide variety of mini-units or "exploratory wheels" on a quarterly basis to expose students to subject areas that can be taken as full-year courses in the eighth grade. And one Pennsylvania district that we studied is adopting a middle school model, while the other study district has completed the process and emphasizes higher-level thinking skills (such as critical thinking, analysis, and synthesis), cooperative learning, less reliance on lectures, and more active student learning. This approach was developed to make schooling more personal, engaging, and challenging for "middle level" students and is specifically designed to respond to the needs of different kinds of learners.

Finally, at the high school level, most of the districts we visited were focusing their curriculum and instructional efforts around school-to-work or related technical preparation objectives. Several of the districts we visited were restructuring their secondary instruction around the concept of "block scheduling," which allows students more time to study subjects actively and in greater depth and embraces a greater variety of student learning styles and interests. For example, both of the Pennsylvania districts that we visited were starting to use block scheduling in the 1996-97 school year, one Missouri district was considering block scheduling in 1996, and individual high schools in both California districts had adopted block scheduling. One of the New Mexico districts that we visited has recently gone to block scheduling, and staff recognize that this form of instruction requires changes such as less time spent with teacher lectures and more time devoted to student hands-on activities.

But among the rich variety of general education reforms that we observed in local districts, we were most struck by the extent to which schools are offering high school programs to link students with and prepare them for the world of work. These kinds of reforms support students with a diverse set of goals, interests, and skills. The strong influence of school-to-work principles is significant because there has been limited coordination between the school-to-work reform movement (and the ideas that underline this initiative) and standards-based reform (Center for Policy Research on the Impact of General and Special Education Reform, *State Education Reform*, 1996).

The Transition from School to Work

Improving the transition from school to work has been a major focus for the reform of secondary schools in the districts that we visited. For example, one New Mexico district has:

- **Restructured its entire secondary curriculum to reflect school-to-work principles;**
- **Worked with businesses to identify occupational skills;**
- **Eliminated the "general track" for non-college bound students and instead established four career clusters from which students can choose in ninth grade;**
- **Created technical preparation labs in the middle school to introduce the career clusters;**
- **Developed academies for two of the career clusters and linked them with relevant employers in the community; and**
- **Developed career apprenticeships in the community.**

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. The districts we visited consistently talked about restructuring their secondary curricula around school-to-work objectives, for the most part in response to either federal or state initiatives. For example, New Mexico has had a strong state-level school-to-work tradition, and the high schools in the districts we visited have restructured or are restructuring their curriculum according to school-to-work principles. One district has partnered with a local community college to develop performance standards that align the high school and the community college curricula.

Missouri has established an "A+ School Program" that requires participating secondary schools to adopt many school-to-work concepts. One of our Missouri study districts has applied for an A+ grant, and the other district has been creating a technical preparation program in its high school over the past three years. The high school is offering applied academic courses, providing work force experience, and creating relationships with a local junior college so that some of the high school classes will be considered for college credit. In addition, the high school is working with the regional vocational technical high school to develop other ways to infuse school-to-work principles into the program.

One California district has begun a PATHS program at the secondary level. As a part of this program, students will earn a certificate of initial mastery in tenth grade to certify their ability to either complete college-level work or enter the job market. Then, in the 11th or 12th grade, they will select a "career path" and will be encouraged to follow it through to high schooi graduation. Through the career path, the student will learn about and actually receive hands-on job experience in a particular field. Upon completion of the path, students should be able to get a job in the field, go on to post-secondary technical training, or apply to a college or university.

Both Pennsylvania districts have been heavily influenced by technical preparation programs in neighboring districts. Consequently, their high school curricula are already beginning to incorporate many of the aspects encouraged by school-to-work proponents: the integration of academic and applied curricula; middle school career counseling; and career course work clusters beginning before the 12th grade.

What we have just described are the kinds of reforms that our local study districts are adopting. Again, it does not appear that these local initiatives have been stimulated by new state standards and standards-based reform. Rather, these district initiatives are based on established and concrete approaches to improving curriculum and instruction at various grade levels.

In looking across the reforms that have just been described, it is important to underline the fact that *our study districts are adopting approaches that are perceived to be well suited to supporting diverse populations of learners, including students with disabilities.* From the "hands-on" and group activities for younger learners, to a more challenging and personal middle school environment, to the "school-to-work" programs at the high school level, these reforms are designed to support students who have different interests and who learn in different ways and at different speeds. For example:

- Staff members from the Pennsylvania district that is adopting more developmentally appropriate practices for younger children reported that the hands-on and group activities are more appropriate for students with disabilities than more traditional approaches.

- Staff from one of our New Mexico districts reported success in integrating students with disabilities into their middle school teams.

- One Missouri district told us that they have modeled their school-to-work job shadowing program after their already-existing special education job shadowing program.

In this context, it is also important to stress that the kinds of educational programs that are being provided for students with disabilities in our study districts are highly dependent on *local* decisions about reforms in curriculum and instruction. The school districts that we studied are often making their own decisions about which kinds of reforms to undertake—reforms that may or may not match up with state priorities and standards. This causes a great deal of variability in local practices, particularly as it relates to educational programs for students with disabilities.

* * *

Throughout this chapter we have examined the interaction between state-level standards-based reform and local district practices and priorities in our study states. First, we looked at reasons why standards-based reform, as it is presently carried out by the states that we studied, is having a limited impact on local classrooms in our study districts. Then we turned to the kind of educational reforms that our study districts *are* adopting. These reforms include concrete initiatives at various grade levels designed to improve curriculum and instruction (with an emphasis on instruction) and, at the same time, better serve a more diverse student population.

We have also noted that the gap between state-level standards-based reform and local reform initiatives is characterized by a great deal of variability in our study states. This is particularly true when one examines local educational programs for students with disabilities, which is a subject that we will explore in greater depth in the next chapter.

Chapter III. Variability and Innovation in the Educational Programs for Students with Disabilities

The preceding chapter discussed the gaps between state-generated standards-based reform and local innovations in education. These disconnections between state intentions and local actions causes variability and sometimes even an element of chaos in the general education enterprise. *However, the variability surrounding the education of students with disabilities is particularly acute.* Since students with disabilities have generally been inadequately considered in standards-based reform (Center for Policy Research of the Impact of General and Special Education Reform, *What Will It Take?*, 1996), and since programs to include special education students in general education classrooms are generally defined and carried out locally in our study districts, programs for students with disabilities vary from district to district, and even from school to school.

In this chapter, we will examine the variability in our study districts' educational practices as it relates to:

- Local definitions of inclusion;
- Policies for including students with low-prevalence and high-prevalence disabilities in general education classrooms;
- Including students with disabilities in standards-based curriculum reforms;
- The interplay among assessment, accountability, and students with disabilities;
- The grading of students with disabilities;
- High school graduation standards for students with disabilities; and
- Services to students with disabilities in schools that are experimenting with site-based management.

But before considering these variabilities, it is important to emphasize that our study districts are also changing the way they deliver services to students with disabilities and are engaged in an impressive amount of work to meet the needs of all students, including students with disabilities, in the general education classroom. This movement is part of a quiet, low profile, but major shift in providing assistance. The states and local districts that we studied are moving away from defining the services that students need by a *placement category* (for example, a student with disabilities in need of a resource room or a special day class) or by *federal program* (for example, a student who needs Title I remediation services or bilingual education).

As we visited schools, it was impressive to observe the diligence and creativity with which they strive to meet the diverse needs of students in their regular classrooms. We found that there are "quiet revolutions" occurring as districts find cost effective ways to better deliver services to the students who need them. Districts that we studied are reaching out in many directions as they strive to improve their educational practices and adopt the following kinds of approaches:

- *Inclusionary* models are being developed to meet a diversity of student needs in the general education classroom. "Inclusion" is the practice of delivering a student's special education services in the general education classroom, rather than removing the student from the classroom for special instruction.
- In special education, *cross-categorical* programs have been designed to meet the common needs of students with individual education plans (IEPs), regardless of their disability label.

What Is an IEP?

In 1974, Congress passed *The Education for All Handicapped Children Act*, which guaranteed that children with disabilities could no longer be denied a free, appropriate education. As a part of this law, each student receiving special education services must have an individualized education plan (better known as an IEP) that sets goals for the student and describes what kind of support services that student will receive. The IEP must be developed by a committee composed of at least the child's teacher, the parent, a representative of the local school district, and, when appropriate, the student.

- Services to special and general education students are being delivered *non-categorically*, which means that a variety of categorical programs, such as Title I, bilingual education, migrant education, and special education, are being coordinated and used to meet common student needs.

This shift in service delivery is primarily a phenomenon at the local level in our study states. In fact, much of the activity in our study districts predates any state initiatives. There are a number of reasons for this. For example, one Missouri district adopted cross-categorical programming to solve a chronic shortage of special education teachers. In that district, students with disabilities are grouped cross-categorically for instruction in particular subject areas. Every teacher is certified to teach cross-categorically and to teach every disability.

In other districts that we studied, district officials have undergone a philosophical shift and now believe that students with and without disabilities have many of the same learning needs. In addition, some districts feel that they can better serve *all* students who are at risk of school failure through a non-categorical program. For example, one California district with an increasingly diverse student population has consolidated its categorical programs into a school-wide approach to meeting the needs of all students. Instead of writing separate plans for programs such as special education or Title I, schools write a single plan that describes all of the supports and services in that school and how they are going to meet the needs of all students.

In the other California district, all of the special education teachers at one high school are responsible for all of the students with disabilities. Special education teachers divide up the curriculum and provide support in different curricular areas rather than providing support across the curriculum to particular students. The program is divided by subject matter rather than by student, much as the regular high school program is.

Both of the New Mexico school districts that we studied are developing innovative service delivery systems.

Although our study states are undertaking some initiatives to reduce the number of students who are inappropriately referred to special education, most of the work on this issue occurs at the local level. We found that the districts that we studied often shared the same reasons for embarking on these reforms:

- *To improve their "hit" rate.* Our study districts are seeking to improve their ability to accurately identify only those students who need special education services.
- *To reduce the over-identification of students of color.* In many communities, the percentage of students of color identified for special education services is significantly higher than their representation in the population would warrant.
- *To contain costs.* If a district is over-identifying students for special education services, then it has a financial as well as a programmatic reason to improve its "hit" rate.
- *To sever the link between eligibility and accountability.* As states and districts encourage schools to include all students in statewide assessments, districts are realizing that identifying a student for special education does not remove that student from the district's "accountability pool."
- *In response to monitoring.* Some districts that we studied have been criticized during state monitoring visits for over-identifying students with certain disabilities.

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For example, one district has moved away from services based on categorical programs to services based on what individual students need, and staffing patterns have changed accordingly.

The districts that we visited are also trying to prevent special education placement for students who may not need it. Our study districts—primarily in response to the spiraling costs of special education and concerns that too many students, particularly students of color, are being identified for special education—are trying to improve many of the processes that surround the identification of a student for special education services. Before formally referring a student for special education evaluation, many educators are now advocating that schools exhaust all other possible options to support the student in the general classroom. To reduce inappropriate referrals, our study districts have taken on the same three general approaches:

- *Pre-referral strategies.* One way to prevent students from being unnecessarily referred to special education is to help teachers to provide early assistance and increase their skills in dealing with more difficult-to-teach children. For example, one Missouri district uses "alternative intervention teams" of general and special education teachers who work together to solve problems and create strategies to meet the needs of students who are having problems at school.

  One California district holds "at-risk" conferences as a pre-referral strategy. During the conference, teachers can identify up to five students about whom they are concerned for any variety of reasons, such as attendance, medical problems, behavior, or academics. During the conference, staff discuss the students and brainstorm strategies to help. An action plan is developed and carried out for each child as a result of the conference. Only after this avenue is exhausted are students recommended for special education evaluation.

- *Early, intensified instruction in elementary grades, particularly in the area of reading.* Many children are first referred to special education when they have difficulty learning to read or cannot read by the end of third grade. Therefore, literacy goals and other attempts to intensify early instruction are prominently featured in many of the districts that we visited. For example, the California districts believe that their intensive early literacy efforts will reduce the numbers of students referred to special education. In addition, one California district has expanded its focus on reading as a way to address the over-identification of African-American males in self-contained special day classes for students with learning disabilities. This program identifies students who were referred to special education as a result of a reading deficiency and provides them with intensive reading instruction during the summer as a way of moving them beyond the special day class. The district has targeted boys who are leaving elementary school so that the remediation might adjust their placement from a self-contained classroom to a resource room level of service as they enter middle school.

- *Improved training for diagnosticians.* Children with limited English skills can be identified for special education simply because diagnosticians are unable to separate a child's trouble with English from the existence of a learning disability. New Mexico, therefore, is developing training programs for bilingual diagnosticians and has distance learning programs for diagnosticians already in the field. One of the New Mexico districts we studied is also attempting to develop specific and reliable assessment techniques for non-English speaking students by pairing speech therapists and bilingual diagnosticians to assess students for special education eligibility. In addition, one California district is providing extensive training to school psychologists in order to reduce the number of inappropriate referrals to special education due to language or cultural differences between students and the psychologists who test them.

Now that we have discussed some of the innovative services that our study districts are delivering, we will turn back to the issue of variability in local education programs for students with disabilities.

Variability in the Education of Students with Disabilities: Definitions of Inclusion

A national movement toward inclusionary programs for students with disabilities has grown in recent years. In general, inclusionary programs strive to provide services to students in their general education classrooms, although definitions of "inclusion" vary, as we will see.

Ironically, although many officials in our study states discussed a variety of efforts that were related to inclusion, only one of these states, New Mexico, has a specific policy supporting inclusion. In 1991, New Mexico's state superintendent of public instruction issued an administrative policy promoting full inclusion, but it was issued as a "value statement rather than a regulation or mandate." The policy directs state education personnel to "support, encourage, and facilitate emerging local practices and creative utilization of resources which address the full inclusion of all children in the local school and community."

But none of the states that we studied has a formal policy that would lay out and define inclusionary practices. As a result, there is a great deal of variability in how inclusion is defined among districts and among schools within districts. For instance:

- One Missouri district defines "inclusion" as students with disabilities attending the class they would attend if they did not have a disability, with in-class supports. In the other Missouri district, students who receive instruction in the general education class for most of the day, but who are pulled out for special instruction, are considered by teachers as "included."

- One California district uses learning resource specialists to support students with high-prevalence disabilities (such as learning disabilities and mild mental retardation) in the general classroom, but that practice is not considered inclusion. Inclusion is defined as serving students with low-prevalence disabilities, particularly severe cognitive disabilities, in the general classroom.

Our study districts also differ in how general and special education teachers and other staff work in support of inclusive programs, reflecting different ideas about what inclusion is:

- In one Missouri district, any student with a low-prevalence, cognitive disability has a full-time paraeducator in the general classroom who works with just that student. In the other Missouri district, paraeducators work in inclusive classrooms to support the class as a whole.

- One Pennsylvania district uses separate resource rooms at the elementary level to provide special

Who's in Special Education?

According to the *18th Annual Report to Congress on the Implementation of the Individuals with Disabilities Act*, approximately 12% of elementary and secondary school students received special education services. The approximate breakdown, by category, of students placed in special education is as follows:

Specific Learning Disabilities	51%
Speech or Language Impairments	21%
Mental Retardation	12%
Serious Emotional Disturbance	9%
Hearing, Visual, Orthopedic, or other Health Impairments	7%

Special education students spend their school days:

In a regular classroom	43%
In a resource room	30%
In a separate classroom in a regular school building	23%
In a separate facility	4%

The school districts that we studied often have different policies for students with low-prevalence and high-prevalence disabilities. "High-prevalence disabilities" are generally defined as learning disabilities and speech or language impairments. These two disability categories make up about 72% of all students in special education. The rest of the disability categories comprise the "low-prevalence disability" groups.

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services to students with disabilities. At the middle school level, general and special education teachers co-teach all students in the same classroom. The other Pennsylvania district uses a co-teaching approach in elementary schools, and it is developing a similar system for junior high school students. Both districts consider all of these students as "included."

- The inclusion programs in the two New Mexico districts that we visited looked very different within and between the districts. For example, one district considered a range of service delivery options as inclusive, from self-contained classrooms for secondary students with severe disabilities in their home school, to middle schools using their special education teachers to reduce class size by becoming part of teams serving both regular and special education students. The other district also defines inclusion as offering a variety of placement and service options with an emphasis on providing the least restrictive environment that the district considers appropriate to individual students with disabilities.

Students with disabilities may or may not attend their neighborhood school:

- One Missouri and one New Mexico school district define inclusion as, in part, attending the school the student would have attended if the student did not have a disability.

- In other districts, included students attend a school that has an inclusive schooling program. For example, one Pennsylvania district designates different elementary schools to provide special education services for specific low-incidence disabilities or using different service delivery models. Parents who want an inclusive program would not necessarily be able to send their children to the neighborhood school, but rather to the school that offers inclusion.

- One California district provides inclusive programs if the parent requests it. The district then works with the parent to find an appropriate school, which may or may not be the student's neighborhood school, based on student needs, transportation, and space availability. In the other California district, one high school has become known for its inclusive education program. Because California parents may choose among schools within a district, many parents have chosen to send their children with disabilities to this school.

Students with disabilities may or may not receive truly inclusive services, depending upon their grade level:

- In one Missouri district and one California district, students at all levels of the system—elementary, middle, and high school—are found in inclusive programs.

- On the other hand, inclusion is more common at the elementary school level in the other Missouri and California districts, as well as in the New Mexico and Pennsylvania districts that we visited. Some district officials attributed this grade level difference to fact that districts have introduced inclusion gradually, starting with the early grades and then moving upward through the school system.

Finally, our study districts differ in the pervasiveness of inclusion throughout the district:

- In one small, rural Missouri district, every school has inclusive programs.

- In the California district that only responds to parental requests for inclusion, and which defines inclusion as students with severe cognitive disabilities receiving support in the general classroom, fewer than five percent of these students are included. Each new attempt at inclusion requires school-wide planning.

- In the New Mexico and Pennsylvania districts that offer inclusion programs primarily at the elementary school level, fewer older students with disabilities are in general education classrooms.

- In the Pennsylvania district that designates certain schools to provide specific special education services, the spread of inclusion programs across schools is uneven.

From this data, one can see that many of the districts that we studied are actively providing inclusionary programs, but they have the flexibility to define for themselves what "inclusion" means.

Variability in the Policies for Including Students with High-Prevalence and Low-Prevalence Disabilities in General Education Classrooms

Overall, when it comes to inclusion, the districts that we studied have separate—although generally informal—rules for students with high-prevalence disabilities (such as learning disabilities and mild mental retardation) and low-prevalence disabilities (such as severe cognitive disabilities or deafness or blindness). Our study districts tend to follow these rules rather strictly, which can work to the detriment of individual students. But parents who are well connected to schools and know how to make the rules work for them are more likely to obtain the kind of program for their child that they want. Less well-connected parents and their children can suffer under such systems.

Among the districts we studied, students with high-prevalence disabilities were more likely to be targeted for inclusion. In one Missouri district, students in the low-prevalence categories are included on a individual basis, based on parental request, although the district describes its "cross-categorical" program for students with high-prevalence disabilities as inclusive. In one California district, all learning disabled students were returned to their home school in a district-wide move to create more inclusion programs, although students with low-prevalence disabilities may still be attending disability cluster programs. By contrast, the Pennsylvania and New Mexico districts that we visited served students with low and high-incidence disabilities through a variety of service delivery models, including inclusion.

Our study districts also differ in the ways students with disabilities get into inclusive programs. In some districts, *the school suggests inclusion* as an option for students. This method of selection leads to a more equitable distribution across race and socioeconomic lines of students who are included.

In other districts that we studied, *students whose parents requested inclusion* were primarily the students who received these programs. This method of selection generally favors students whose parents are well connected to the school and know how to negotiate the system. In one California study district, this works against families of color who have children with low-prevalence disabilities. In 1995, while students of color comprised 65 percent of the total school population, they represented only 37 percent of the students with low-prevalence disabilities who were served through inclusive programs.

Variability in Including Students with Disabilities in Standards-based Curriculum Reforms

Over the last 25 years, the curriculum for students with disabilities has changed dramatically. Prior to 1974 and *The Education for All Handicapped Children Act* (now called the *Individuals with Disabilities Education Act*), students with disabilities usually had their own separate educational program, if they went to school at all. Although federal laws after 1974 required that students with disabilities receive the same basic curriculum as other students, many districts still maintained separate curricula and service delivery systems for special education students. As a result, advocates have recently worked to ensure that more students with disabilities have access to the general curriculum.

Now, with the standards-based reform movement, *all* students are being asked to go beyond the attainment of basic skills, and this is supported at the federal level. In June of 1997, the *Individuals with Disabilities Education Act* (IDEA, P.L. 105-17) was reauthorized and amended in a number of ways. One of these changes specifically addresses the access of students with disabilities to the general education curriculum. A special education student's IEP must include an evaluation of the student's academic performance and how the student's disability affects his or her progress in the general education curriculum. IEPs must also include measurable annual goals, including benchmarks or short-term objectives that enable the student to participate in the general education curriculum.

Further, IDEA now requires that states establish goals for the performance of children with disabilities that "are consistent, to the maximum extent appropriate, with other goals and standards for children established by the State." States must also establish performance indicators to assess the progress of students with disabilities toward meeting state goals including, at a minimum, performance on assessments, drop-out rates, and graduation rates. Finally, states must report to the federal government and the public every two years on the progress of children with disabilities toward meeting state goals.

These new federal requirements will obviously impact state and district programs in the future. States and school districts will be required to consider more carefully how students with disabilities can be accommodated in a curriculum based on higher standards. Questions that have thus far received scant attention, such as how the new state standards for education apply to students with disabilities, will need to be examined much more closely.

In this context, it is interesting to examine how our case study sites have dealt, to this point, with the idea of including students with disabilities in standards-based reform. We were struck by several issues in this regard. For example, the districts that we studied appear to be having more difficulty thinking about how to include students with disabilities in new standards-based curriculum frameworks than in some of the other initiatives with which the districts are involved. This may be because the standards raise specific (and often unanswered) questions about how to accommodate students with disabilities and our study districts have thus far received little guidance about this issue.

In one California district, teachers in elementary special education classes use the general education curriculum as the overall framework and then make adaptations. Thus, their time lines are different for teaching certain portions of the curriculum, and their criteria for what constitutes "A" level work is different. District officials note that "a lot of those [special education] teachers are wanting their classroom to look more like an academic environment than a therapeutic environment. We see more books, and more academic kinds of things, even in classes that traditionally serve a very low functioning population."

As was discussed in the last chapter, most of the districts we visited were not far enough along in creating a standards-based curriculum to have completely dealt with the implications of including students with disabilities. And, as with inclusion policies, districts tend to address this issue differently for students with high-prevalence and low-prevalence disabilities. Both of the Missouri districts we visited are assuming that most of the students, except for those that are significantly cognitively impaired, will work with the state's *Show Me* standards. However, neither district had specifically discussed how students with disabilities gain access to the curriculum, whether or not the standards are appropriate for all students with IEPs, and what accommodations might need to be made for students with disabilities.

Two of the other districts we studied (one in Pennsylvania and one in New Mexico) assumed that under a standards-based curriculum, students with disabilities would work with the same curriculum as general education students, but the delivery system would continue to be different. On the other hand, two districts further along in implementing standards-based reforms (again, one in Pennsylvania and one in New Mexico), had taken steps to include special education staff on curriculum development committees. However, the staff from the New Mexico district that is developing its own performance-based curriculum admitted that they were not sure how their newly developed high school exit standards will apply to students with disabilities.

Our study districts are also grappling (sometimes separately) with how to include students with severe disabilities in standards-based curricula. The districts that we studied are considering the development of curricular adaptations or curriculum accommodations, but they have not systematically addressed this population as it relates to the new standards. In fact, Missouri state officials told us that they are receiving an increasing number of requests from districts for curricular adaptations.

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In summary, the states and the local districts that we studied have not progressed very far in thinking about standards-based reform and its implications for students with disabilities. It is important to note, however, that in the absence of state guidance, the districts that we studied are individually determining who will be "in" the basic curriculum and who is "out."

Variability in the Interplay among Assessment, Accountability, and Students with Disabilities

As states change their assessment and accountability systems as part of standards-based reform and look more closely at student achievement, advocates have pushed to make sure that students with disabilities are part of any new assessment and accountability systems. People want to know how well schools are educating students with disabilities, how these students' test scores compare with the scores of peers without disabilities, and whether schools are helping students with disabilities to achieve high standards.

Again, the reauthorization of IDEA in 1997 has addressed the issue of assessment and will affect future state and local practices. IDEA now requires that children with disabilities participate in state- and district-wide assessment programs, with appropriate accommodations where necessary. States and districts must also develop guidelines for the participation of students with disabilities in alternate assessments, when these are appropriate. Further, states must publicly disclose the number of students with disabilities participating in the regular assessment and the number taking an alternative assessment. Finally, starting July 1, 1998, states must report how well students with disabilities are performing on regular assessments, and by July 1, 2000, how well they perform on alternative assessments.

To this point, while written state policies have generally *encouraged* the participation of students with disabilities in statewide assessments, they have also allowed districts considerable leeway in this matter. Exclusion guidelines for students with disabilities have traditionally been fairly broad. Although our study districts consider several factors in determining whether a student with disabilities should participate in a statewide assessment, most districts leave this decision to the IEP team. In all four states that we studied, any student with an IEP has the potential to be excluded if the IEP team determines that this should be done.

Assessment and Students with Disabilities

As the public continues to demand increased accountability from its schools, and as school administrators and policymakers increase their use of performance and outcome data for decision-making, people are paying more attention to who gets tested, what kinds of tests are used, and what the test results mean. These issues can have special significance for students with disabilities, especially since these students have frequently been left out of statewide assessments in the past.

Today, state policies generally encourage the participation of students with disabilities in one of three ways:

- Students with disabilities take the state assessment in the same form and fashion that other students do, *without accommodations*;
- Students with disabilities take the state assessment, but in a different way, *with accommodations*. These accommodations typically must be described in a student's IEP and are generally the same accommodations made for instructional purposes. Accommodations can include taking untimed tests, large print or braille tests, teachers paraphrasing the test instructions, or teachers reading parts of the tests to students; or
- Students with disabilities take a different, or *alternative*, assessment. Again, the need for an alternative assessment is generally noted in the student's IEP. By using an alternative assessment, even students with severe disabilities are able to be tested and hence included in the state's accountability system. But to date, only the state of Kentucky has developed an assessment of this kind.

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One California district is working to ensure that students with disabilities are included in the district assessments because there is a sentiment that excluding these students sends a message to teachers and principals that they are not responsible for the performance of students with disabilities in their school—even when the students spend most of the day in the general education class.

Given these broad policies, the numbers of students with IEPs that are excluded from state assessments varies considerably from district to district and even from school to school in our study states. Some study districts have a strong philosophy of testing all children possible, while others exclude a large proportion of students with disabilities because they fear that those students will bring down their district or school mean test scores.

For example, students with disabilities in both Missouri districts were included in the state assessment, unless otherwise noted in their IEPs, as is required by state and district policy. However, respondents in one district reported that only 50 percent of the students with IEPs actually took the test. In the other Missouri district, some of the teachers reported that they automatically administer the state test with "blanket" accommodations for all students in the special education class—whether this accommodation is needed (or indicated on the IEP) or not. By contrast, one Pennsylvania district reported that they included every student who received instruction in the regular classroom in the statewide assessment.

When considering whether or not to include students with disabilities in the state assessment, officials in our study districts have been influenced by the way their scores are reported. For instance, states that strongly encourage *all* students to be included in the assessment, and also disaggregate student scores by IEP status, have been more likely to influence districts to include students with disabilities in the assessments. Disaggregated scores allow a district to report the scores of students with disabilities separately—meaning that if these scores will lower the district's average scores, this phenomena can be explained.

In Missouri, districts are not required to report the scores of students with IEPs who take a *modified* version of the state assessment. The state will, however, disaggregate test data by student factors (such as IEP status) if a district requests this. But only one district that we studied has taken advantage of the state's offer to disaggregate district scores by IEP status. This dis-

Problems with Disaggregation of Data

Some of the districts that we studied have been reluctant to have students with disabilities take state assessment tests. A major reason is the fear that these students' scores will be low and bring the district average scores down. This has become more of a factor as states have increasingly held districts responsible for student scores on state tests.

Disaggregating data is theoretically a solution. Test scores for students with disabilities—or for students who do not speak English well—could be reported separately to the state. And in fact, the 1997 reauthorization of IDEA requires that assessment scores for students with disabilities be disaggregated and reported to the public.

But up to this point, the disaggregation of scores has created dilemmas. Some advocates have argued that test scores should be disaggregated by not only disability, but by race and ethnicity. As a result, some of the districts that we studied have not wanted student test scores disaggregated. In addition, the population of students with disabilities is very diverse. Districts have questioned if it is appropriate to merely disaggregate test scores based on whether or not a student has an IEP. For example, should students only have disaggregated scores if they spent more than 20% of their time in special education?

Finally, the states and districts we studied have been concerned about reporting the test scores of students with IEPs who take the test with modifications. For instance, some students take a large print version of the test, and other students take untimed tests. States have questioned whether these scores should be reported, whether they should be disaggregated, and how they can be compared to one another.

Some of these issues will continue to arise even as states and districts are required by IDEA to report and disaggregate the assessment scores of students with disabilities.

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Including and Excluding Students with Disabilities from State Assessments

In the states we studied, school districts must make their own decisions about whether students with disabilities will be included in statewide assessments. Some districts merely adopt the state policy, while others create their own. This variability is exemplified by California.

California has struggled with the question of including students with disabilities in its new testing program. Currently, the state provides incentive funds for districts to assess all students on one of a number of approved standardized tests available through commercial publishers. In its original guidance, during the spring of 1996, the state board of education *required* that all students participate in the assessment, regardless of IEP status. Shortly after that policy was released, in response to strong negative comments, the state board softened the language and "*encouraged*" districts to include all students possible in the testing program. The two California districts that we visited have responded differently to this direction.

One California district has followed the *first* state board of education policy and adopted a "no exclusion" policy toward assessment. Students with disabilities who are included in the general education classroom take the standard district assessments, and these scores are reported along with other student scores. The district's assessment division is now working with the special education division to develop alternative ways of assessing students for whom the regular test, even with accommodations, is inappropriate.

The other California district follows the *final* state board of education policy that encourages participation. This district requires that all students served through "resource rooms" take a standard achievement test. But "special day class" students are tested if they are mainstreamed for an academic subject, or on a case-by-case basis if they are not mainstreamed for an academic subject.

The latter district did push to have all students included its assessments at the end of the 1995-96 school year. District officials assured principals that test scores would be reported separately for students with IEPs and limited-English proficiency. In addition, the district changed the way test scores were reported to the school board. Rather than just report the school's average score, officials reported the *percentage* of students who took the test and then the results, so that the board would be able to see which schools excluded large numbers of students. As a result, approximately 60 percent of the special education students were tested. But student participation was uneven across the schools. In some schools virtually every student was tested, while in other schools, few students that are allowed to be exempted were tested. District officials speculate that some school principals did not trust the central office to disaggregate the scores because this had never happened in the past.

trict routinely has the scores of students with IEPs disaggregated and consequently reports a greater percentage of these scores to the state. In the other Missouri district, although about 50 percent of the students with IEPs take the state assessment, very few scores are actually reported to the state.

Pennsylvania has not disaggregated test scores by students' educational status. For district administrators who felt that students with disabilities would score lower than their general education counterparts, there was no incentive to include these students. However, Pennsylvania is currently designing a state-wide report card and may include the percentage of students who do not take the test and test results disaggregated by disability.

Valid data from districts on the extent to which students with disabilities are participating in statewide assessments and their performance is difficult to obtain. For example, New Mexico requires school districts to report the number of students exempted from its state assessment and the reasons for exemption to the state department of education, but this information is not reported to the public.

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Since Missouri has not required districts to disaggregate state assessment data by IEP status, and districts do not indicate IEP status for students who are taking the tests without accommodations, the state does not know how many students with IEPs have participated in statewide assessments. They are currently revising this process to gather baseline assessment data for students with disabilities.

The state and local officials that we interviewed agreed that alternative forms of assessment, such as performance-based and portfolio assessment, are well suited to students with disabilities because the students are more easily accommodated and will perform better on such tests. Because of this belief, one New Mexico district's special education staff is developing portfolio assessments for students with disabilities at all school levels. But the belief that students with disabilities will do better on alternative assessments is untested, since data remains scarce.

Variability in the Grading of Students with Disabilities

Applying standards-based curriculum reforms to students with disabilities has raised some issues regarding district grading policies. When students with disabilities are included in general education classrooms and expected to cover the same curriculum as other students, teachers need specific standards for grading these students. Staff and parents in two of the districts we visited raised the issue of fair grading policies—should students with disabilities in the general classroom be graded against the same standards as other students, or should the standards be adjusted to accommodate their specific disabilities?

Our study districts are exploring creative ways to handle this problem. One of the Pennsylvania districts that we studied has drafted a proposed policy for "goal grading," the assessment of progress toward an IEP goal, in lieu of regular grades. This policy would apply to students who cannot be graded in the usual way "because of permanent or temporary interruptions to the student's cognitive, affective, or psychomotor process." Goal grading must be agreed to by the parent, included in the student's IEP, authorized by the building principal, and designated on the student's report card. In one California district, teachers engage in "collaborative grading" practices in which general and special education teachers agree together on the grade that individual students will receive in a particular course.

Difficult issues are raised by all of this, however. As states proceed further with standards-based reforms and seek to raise the achievement of all students according to a common set of measures, they will need to know if special education students have access to the general education curriculum and how well they are faring with it. If students with disabilities are graded differently than other students, it may be hard for schools, parents, or the state to assess how well students with disabilities are doing at school compared to their general education peers. Differential grading policies can give flexibility to teachers as they assess students' performances, but they can also provide a way to hide the fact that students with disabilities are not being held to appropriately high standards. A careful examination of the particular circumstances in which a student with disabilities is being graded differentially will help determine if this process is appropriate and to the student's benefit.

State Monitoring of Local Programs

Our study states maintain an impressive level of effort to coordinate the monitoring of special and general education programs at the local level. This state-level action was largely invisible, however, when we visited local school districts. In the districts that we studied, special education monitoring by the state is still seen as separate from the general education monitoring. For instance, although Missouri has specifically linked special and general education monitoring, respondents in both districts that we visited reported that the reviews are separate. In fact, officials in one district reported that the two reviews are on a different schedule.

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Variability in High School Graduation Standards for Students with Disabilities

Most state and district high school graduation policies in the states we studied create a system that is highly subject to interpretation by parents, teachers, and administrators. In California, Pennsylvania, and Missouri, graduation requirements for students with IEPs are the same as those for other students—except for any adjustments that the IEP team makes. An IEP team may alter the graduation requirements for a particular student by, for example, requiring six credits in mathematics instead of nine. As long as the student completes the requirements on the IEP, the student can graduate with a regular diploma. Thus, there seems to be a significant amount of "wiggle room" in the system for students with disabilities. This is *not* true in New Mexico, where the IEP cannot supersede state graduation policies; a student must pass the state high school graduation examination or receive a certificate of completion.

The California, Pennsylvania, and Missouri policies are not only subject to influence, but they are skewed toward parents who know how to negotiate the system. Further, policies such as these make it difficult for states to ascertain how many graduating students with disabilities were given and able to complete the general education curriculum, which means that local accountability for these students is limited. For example, California allows IEP teams to make adjustments in the graduation requirements for students with disabilities. One California district that we studied has recently set new graduation requirements, and students must now have a 2.0 grade point average along with the proper credits to graduate. Parents of students with disabilities in this district who know how the system of exemption works have requested an IEP meeting to have courses that their child has failed or done poorly in removed from those required for graduation. As a result, the student's grade point average increases, thus increasing the likelihood that the student will graduate with a standard diploma.

This ability to manipulate graduation standards for students with disabilities may be exacerbated by the new accountability systems and higher standards that districts and states are enacting. Because policies are broad, other people involved in the IEP process, such as teachers and administrators, could influence or manipulate graduation requirements for accountability purposes. For instance, a principal who is being pressured to raise the overall graduation rate in his or her building could eliminate required graduation courses through a student's IEP to ensure that student will graduate.

Variability in Services to Students with Disabilities in Schools that are Experimenting with Site-based Management

"Site-based management" is an education reform strategy that has been popular over the last several years. The concept is that states would give districts, or districts would give schools, more flexibility and authority to make decisions in line with local needs and conditions. This model normally requires that schools form "site councils" with parents and the community to make decisions in a collaborative manner. Site councils then write their own "site plans" that describe the school's goals and strategies, and the school is then evaluated in accordance with its site plan.

Two of the states that we studied, California and New Mexico, have supported site-based decision-making as a reform strategy, and this can significantly change the way local districts and schools operate. For example, schools can gain considerable flexibility in deciding what education reform will mean at that site and which special projects they will pursue or accept. Site councils can decide for themselves what they want their particular schools to look like.

There are some difficult questions concerning site-based decision-making and students with disabilities. As with other aspects of the education program, special education reform in site-based managed schools is closely tied to the individual school's motivations for reform. This has implications for promoting innovations such as inclusion or the provision of cross-categorical services. In both of the California study districts, including students with disabilities in the general education classroom is the prerogative of the individual school. In both districts, if a school does not wish to operate in the manner suggested by the district, central office staff is virtually powerless to compel the school

to do so—as long as the school is operating true to its site plan. For special education, district staff rely on the state monitoring visit to compel individual schools to act in compliance with special education laws. This, at least, provides a guarantee that schools will remain minimally in compliance with the law.

In New Mexico, staff from both of the districts that we studied commented on the increased autonomy and flexibility that site-based managed schools have in spending special education funds. One district's central office used to administer special education funds by line item, but the district now gives the funding directly to principals and lets schools decide how to spend the money. In the other study district, parents of students with disabilities and special education teachers serve on site-based management teams with principal oversight. These schools can decide how to spend the money allocated for special education instructional assistance and how to deliver services, including whether or how to practice more inclusive schooling practices. There has been some concern, however, that this district's movement toward site-based management may have contributed to a lack of consistency in the implementation of special education procedures across schools. And there is general concern in the state about whether the flexibility that site-based management gives a school to administer its special education programs provides the accountability that is necessary to ensure that students with disabilities are receiving appropriate services.

Thus, encouraging innovative practices in a decentralized governance structure is complex. While decentralized governance structures provide districts and schools *greater flexibility to reform*, individual schools have a great deal of *discretion over whether or not they will reform*. This makes site-based decision-making a *double-edged sword* for special education. On one hand, increased flexibility at the school site can support reforms that benefit students with disabilities. Various innovative programs may be adopted that require redeployment of staff and mingling of diverse dollars to support all students as they pursue common program goals, as well as an increased ability to support a diversity of student needs. But other schools may take the opportunity provided by increased flexibility to *lessen* their support for students with disabilities.

* * *

In this chapter, we have examined the innovation and the variability that exists in the local districts that we studied in regard to educational programs for students with disabilities. While our study districts are very active, for example, in providing inclusionary programs, these districts have the flexibility to decide for themselves what an inclusionary program is. This is because the states in our study have not laid out firm policies to guide local district practices as these districts move forward to improve services and contain costs in educational programs for students with disabilities.

Although states have been slow to think through the implications of standards-based reform for students with disabilities, the 1997 version of IDEA requires that states set educational standards for students with disabilities that are consistent with standards for general education students. As we have discussed, this new version of IDEA also requires that students with disabilities take state education assessments or alternative assessments, and that the test scores be reported to the public over the next few years. IDEA has other new requirements as well that may help to address, in the future, the variability in educational programs for students with disabilities and the extent to which these students are included in the general curriculum and standards-based reform.

Conclusion

There are a number of issues for policymakers to consider that arise out the research we have conducted. First and foremost, it appears that standards-based reform, as it presently exists, may be a necessary but not sufficient push toward improving local school practices. Some of the reasons for this—the newness of the movement, the inevitable discussion and debate that surrounds any significant revision of our education system, and the incremental ways that states are adopting reforms—may be unavoidable.

But there are some steps that states can consider taking to increase the likelihood that standards-based reform has a more significant impact. For example, our information indicates that states should look more closely at the issue of diversity. Our first year of re-

search demonstrated to us that states have not yet determined how standards-based reform can improve the achievement of *all* of the students who attend public schools, although this is a central goal. The special education community is just one example of the kinds of people who should be involved in figuring out how schools can better support the learning of the many kinds of children who attend public school.

Last year's findings are only emphasized by this year's study. As we visited local school districts, we found that dealing with an increasing number of students with different needs is a primary and demanding issue. Schools are seeking outside funding and models that will help them to improve their educational programs in ways that can accommodate students who have a variety of backgrounds, learning styles, and goals. The local need to work with the *differences* among students in helping them to achieve at higher levels only underlines the importance of renewed state action to really understand what it will take for *all* students to achieve at high levels.

A second item for policymakers to consider is that, in the districts that we studied, the pressures of cost containment and an increasingly diverse student population seem to be the prevailing influences on local educational initiatives, rather than the state paradigm of standards-based reform. These state and local pressures and priorities are not mutually exclusive, but understanding what drives district activity will better equip states to create policies that can guide district reforms. To the extent that states can understand and respond to the issues that are driving local school practices, they are likely to have a more significant influence.

Understanding local level pressures and programs is especially important because current inadequacies in state policy and guidance is fostering a high degree of variability in how students with disabilities are treated within the same state system. Policymakers need to consider what kind of balance to maintain between providing clear state guidelines and accountability measures on one hand, and allowing local flexibility on the other, to assure that students with disabilities have access to the best possible educational programs and are treated equitably throughout the state.

Yet another interesting finding is that students with disabilities may actually be benefitting, at this point, from the gap between standards-based reform and local programs. This is because states are at an early stage in investigating the implications for students with disabilities in standards-based reform, but the local districts that we visited are adopting programs that are *designed* to support diverse learners. The amount of local action in this arena, while variable, is significant and impressive. States can build on this momentum to supplement their current standards-based reform policies with more specific instructional guidance that both fits into what districts are already doing and points the way toward greater improvements in classroom practices.

Finally, it was evident that the states in our study have not yet wielded all of their policy tools in support of standards-based reform. In that light, we recommend that state policymakers consider the following questions:

In regard to standards-based reform and general education

- Do state policy documents, such as standards and curriculum frameworks, include specific "how to" guidance about improving classroom practices to achieve state goals? While we recognize that states walk a political tightrope between providing specific, useful guidance and perceptions that the state is mandating a curriculum to local districts, does the state know how local educators feel about the usefulness of state-developed materials? Do local school districts have the *capacity* to use state documents as a basis for changing the curriculum and instruction to meet the state's education standards?

- To what extent has the state surveyed local school districts to learn what these districts perceive as their most pressing and immediate concerns? To what extent is this information used to inform and shape state education policy and practice? What opportunities exist to promote standards-based reform by tying it to local pressures and priorities?

- What specific kinds of educational reforms are local districts adopting, and how do these match with state education priorities? What opportunities exist

to tie together local innovative approaches with state standards-based reform?

- How is state funding for education structured? Are discretionary monies supporting reforms such as school-to-work initiatives tied to standards-based reform rather than taking districts in a variety of directions? Have states considered how the issues of education funding and the need to improve student performance can work in tandem?

In regard to students with disabilities

- To what extent are special educators involved in the *development* (as opposed to merely reacting to or reviewing) of state policies to promote standards-based reform? How involved is the special education community in working on revisions of each of the following policy areas: curriculum, assessment, accountability, teacher policy, finance, and governance issues?

- How appropriate are new state standards and curriculum frameworks for the diversity of students in the schools, including students with disabilities? How can they be adapted to meet special needs?

- How does the state assessment system consider appropriate adaptations and accommodations for students with disabilities? How are districts held accountable for the academic performance of students with disabilities, and how will present state policies need to change in line with the new requirements of the 1997 *Individuals with Disabilities Act*?

- Does the variability in local programs for special education students as described in our study apply to your state? If so, what kinds of state leadership actions might help assure that there is a more widely accepted and used definition of "best practices" when it comes to educating students with disabilities? What balance between firm guidance and policies on one hand, and respect for local flexibility on the other, will result in the best and most equitable educational programs for students with disabilities?

- Along with the flexibility that is given to site-based managed schools, what accountability measures can assure that students with disabilities are receiving an adequate educational program?

- What state actions can support local efforts to prevent inappropriate referrals of students for special education services? What actions can support the impressive amount of local innovation in delivering services to all students in the general education classroom?

- The purpose of this study is not to criticize the districts or states that we studied in cases where we have uncovered troubling questions or discrepancies. Rather, it is designed to look for the *opportunities* embedded within the observations that we have made. Where we uncovered gaps between state intentions and district actions, it is our goal to provide states with the opportunity to reflect upon their efforts and rethink their approaches to implementing standards-based reforms.

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The Center for Policy Research on the Impact of General and Special Education Reform

In October 1994, the U.S. Department of Education's Office of Special Education Programs (OSEP) established a Center for Policy Research on the Impact of General and Special Education Reform (the Center) to study the interaction between current general and special education policies and their impact on students with disabilities. The Center is a joint endeavor of the National Association of State Boards of Education (NASBE), the Institute for the Study of Exceptional Children and Youth at the University of Maryland (UM), and the Consortium for Policy Research in Education (CPRE) at the University of Pennsylvania, and is housed at NASBE.

Each Center partner is conducting interrelated three-year research studies that examine reforms in general and special education policies, their interactions, and their implications for students with disabilities. Areas being researched include standards and curriculum, assessment, accountability, teacher policy, finance, and governance, as well as state responses to federal programs such as Goals 2000 and the School-to-Work Opportunities Act. This issue brief uses data collected by the Center during its first year of research (1995) to 1) describe major trends in general education reform from a standards-based perspective across the 18 states in our study; 2) provide a preliminary assessment of the nature and involvement of special education in these reforms at the state level; and 3) discuss implications of these reforms for students with disabilities and related emerging issues.

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